




# Program Unit Funding

*A Handbook for ECS Operators  
in the 2003/2004 School Year*

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**Program Unit Funding: A Handbook for ECS Operators in the  
2003/2004 School Year**

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Alberta Learning

Special Programs Branch

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10044 – 108 Street

Edmonton AB T5J 5E6

Telephone: (780) 422-6326 in Edmonton or toll-free in Alberta by dialing 310-0000

Fax: (780) 422-2039

Visit our Web site at <http://www.learning.gov.ab.ca/funding/specialneeds.asp> for a copy of this handbook.

This document is intended for:

Teachers	✓
Administrators	✓

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# PROGRAM UNIT FUNDING

## PLEASE NOTE:

*\*throughout this handbook, parent refers to parent(s) or guardian(s).*

## Overview

Program Unit Funding is provided to approved Early Childhood Services (ECS) operators for children with severe disabilities who require additional support beyond that offered in a regular ECS program. Funding is provided for individual programs that meet the educational needs of children with severe disabilities. Program Unit Funding is available for a maximum of 3 years for each eligible child who is at least 2 years 6 months of age on September 1 and less than 6 years of age on September 1.

### Note

To receive this funding, a child must be eligible, according to the criteria described, for at least one of the severe disabling conditions described in the Glossary of Terms of the *Funding Manual for School Authorities for the 2003/2004 School Year*. This funding is in addition to the Basic Instruction funding provided for every eligible ECS child who was registered as of September 30.

- Payment of funding is based on approval of the Program Unit Funding application form.
- An Individualized Program Plan (IPP) must be developed, implemented and regularly revised for each child.
- The child's parent(s)\* must be involved in the development of the IPP.
- A budget for each program unit is required as part of the application and must be based on the program outlined in the child's IPP.
- The Program Unit Funding application should be submitted as early as possible in the school year.
- The deadline for applications is January 1.
- Revisions will be accepted only under extenuating circumstances.
- Applications for children who are diagnosed or registered after January 1 will be accepted until May 1.

Any questions regarding Program Unit Funding should be directed to the Special Programs Branch of Alberta Learning at (780) 422-6326 in Edmonton (toll free in Alberta by dialing 310-0000).

## ECS Context

The principles ECS operators should use when working with a child are outlined in Alberta Learning's *Kindergarten Program Statement* (revised September 2000). These principles set the context for programs for all children. However, children with disabilities require accommodations and adaptations to their programs.

- Principle 1 - Young children learn best when programming meets their developmental needs.



- Principle 2 - Young children develop knowledge, skills and attitudes that prepare them for later learning.
- Principle 3 - Young children with special needs, through early intervention strategies, develop knowledge, skills and attitudes that prepare them for later learning.
- Principle 4 - Young children build a common set of experiences through interaction with others.
- Principle 5 - Parents have the opportunity for meaningful involvement in the education of their young children.
- Principle 6 - Coordinated community services meet the needs of young children and their families.

In addition, as stated in Early Childhood Services Policy 1.1.3 (April 29, 2002), an approved operator shall:

- accept and organize programming for all children with special needs who meet eligibility criteria, and for whom programming is requested
- develop policy and procedures addressing the special needs component of the ECS Program consistent with Alberta Learning regulations
- consult with and inform parents of all program placement decisions and of all program planning, implementation and evaluation activities directly involving their child
- develop, implement and regularly review an Individualized Program Plan (IPP) for each child with mild, moderate or severe disabilities and a child who is gifted and talented.

## BASIC REQUIREMENTS FOR PROGRAM UNIT FUNDING

### Overview

Eligibility to receive funds for a child with a severe disability is based on the following:

- approved operator status
- local ECS special needs policies
- age of child
- severe disabling condition of child
- functioning level of child
- application for Program Unit Funding.

### Approved Operator Status

Only those ECS operators meeting all terms and conditions for approved status are eligible to receive funds on behalf of children with special needs. Please note that status as a designated special education ECS program requires approval by the director of the Special Programs Branch in addition to approved ECS operator status (please see Section 2.5 for private ECS operators and Section 1.7 for school jurisdictions of the *Funding Manual for School Authorities for the 2003/2004 School Year*).

For information on seeking approved ECS operator status, please contact one of Alberta Learning's Field Services Offices at:

- (780) 427-2952 in Edmonton
- (403) 297-6353 in Calgary
- Toll free in Alberta by dialing 310-0000.

## Local ECS Special Needs Policies

It is expected that ECS operators will develop ECS policies to provide programs for children with special needs. These policies should be consistent with those outlined in Early Childhood Services Policy 1.1.3 (April 29, 2002) included in the current Alberta Learning *Policy, Regulations and Forms Manual*. Such policies will include the monitoring and evaluation of Program Unit Funding programs. See Appendix A, page 14 for information on developing local policies.

## Age of Child

Program Unit Funding is available for children with severe disabilities starting at a minimum age of 2 years, 6 months to a maximum age of less than 6 years on September 1. This funding is provided for a maximum of 3 years. The following table outlines the age of eligibility for funding for all types of ECS programs.

AGE OF ELIGIBILITY FOR FUNDING OF ECS CHILDREN	
Eligibility Type	For funding of an ECS program, the minimum age of the child on September 1 of the program year must be:
Child with a severe disability	2 years, 6 months
Child with a mild/moderate disability	3 years, 6 months
Regular program child	4 years, 6 months
Developmentally immature child	5 years, 6 months
<p>Note: A child with a severe disability is eligible for 3 years of Program Unit Funding. Care should be taken to ensure that school entry into Grade 1 will follow the third year of Program Unit Funding. The minimum age for school entry may vary among school jurisdictions. ECS children who meet the age requirement listed above are eligible for ECS Basic Instruction funding, if registered on or before September 30.</p>	



## Severe Disabling Condition of Child

The ECS operator is required to make decisions regarding the severity of the disabling condition based on information and documentation from qualified specialists. A list of the eligible severe disabling conditions is included in the Glossary of Terms in the *Funding Manual for School Authorities for the 2003/2004 School Year*.

## Functioning Level of Child

Although the ECS operator is required to make decisions regarding the severity of the disabling condition, it is the extent to which the child can function in the ECS program that is most important in determining the child's program needs. In the event of uncertainty, ECS operators may contact the Special Programs Branch for advice and/or pre-approval.

Program Unit Funding is designed to provide additional and educationally relevant supports and services that would not normally be available in the ECS classroom. In providing the most enabling educational environment possible, ECS operators are encouraged to consider models other than direct one-on-one assistance, especially for large blocks of time.

A variety of models should be explored before final program decisions are made. The following checklist may help ECS operators in determining an appropriate program.

- | Yes                      | No                       |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Is assistive technology currently being used or would the use of technology help the child?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Are special instructional materials required?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Does the child require regular input or services from a multi-disciplinary team?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Does the teacher or any other ECS staff member require special training?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Do the parents require training to help them facilitate their child's development?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Is special transportation necessary?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Are the child's needs such that direct one-on-one activities and/or individualized instruction within group activities will be necessary? |

## Application for Program Unit Funding

To receive Program Unit Funding, ECS operators must submit a completed Program Unit Funding application. Detailed information on completing the application follows on pages 5–10.

## COMPLETION OF PROGRAM UNIT FUNDING APPLICATION FORM

The following information is provided to assist ECS operators in completing a Program Unit Funding application form. Program Unit Funding System (PUFS) is available for ECS operators to complete their PUF application and submit it electronically to Alberta Learning. PUFS is a web based application program. Procedures related to the integrated application process are automatically applied through the PUFS program. For additional information on PUFS contact School Finance at 427-2055.

## Declaration Page

On the declaration page, the ECS operator declares that an Individualized Program Plan (IPP) has been developed and implemented for each child on the application according to the following criteria:

- **Parent Involvement** — Parents are an integral part of the planning and decision-making process. They must be involved in and informed of all aspects of their child's program. Specifically, they must be fully aware that an IPP is in place and that an application for Program Unit Funding is being submitted.
- **Screening and Assessment** — Written documentation provided by a qualified specialist is required and must identify the severe disabling condition of the child according to the criteria (see the Glossary of Terms in the *Funding Manual for School Authorities for the 2003/2004 School Year*). This documentation must be updated to reflect the current functioning level of the child to confirm that the child continues to qualify for funding. For the claim to be processed, the operator must submit a summary form containing diagnosis and test results (see Appendix B) or actual assessment report(s).
- **Development of IPP Program Goals** — The ECS operator must develop measurable goals and objectives based on the screening and assessment results. These goals should be consistent with the child's assessed area of need. Programming should be based on the six principles from the *Kindergarten Program Statement* (Revised September 2000) that are reprinted on pages 1-2 of this *Handbook*.

- **Teacher-directed Program** — It is essential that a certificated teacher be directly involved in all aspects of the child's program. The child's program activities should be integrated into the regular classroom as much as possible. Support from specialists and other appropriate personnel can assist in the delivery of the child's program.
- **Consultative Assistance** — Appropriate print resources and professional development opportunities, such as special education conferences, in-service activities and support groups should be made available to staff and parents.
- **Direct Services** — Each child should be provided with the direct services necessary to meet their program needs. Parents also may be included in these activities.
- **Case Conferences** — Regular discussions, in consultation with the parents, should be held to evaluate each child's program and decide where change is needed. Case conferences may include one-on-one discussions, small group meetings, extended group meetings or specialist meetings.
- **Other Considerations** — The contact person should be the person most familiar with the details of the application. Signatures of the superintendent/president and secretary-treasurer are required.

## Definitions of Severe Disabling Conditions Page

See Glossary of Terms in the *Funding Manual for School Authorities for the 2003/2004 School Year* for descriptions of the severe disabling conditions.

## Details of Children in Program Unit(s) Page

### Program Unit and Clustering

A program unit may contain one or more children. When a program unit contains more than one child, this is referred to as clustering. ECS operators are encouraged to consider clustering or grouping children to allow for some sharing of services. For example, children may be physically grouped because they have similar disabling conditions and/or are of a similar functioning level. A cluster involves two or more children sharing the same teacher assistant.

### Centre-based Programs

Within centre-based ECS programs, the child receives instruction in a classroom setting at a centre or school. The number of centre program hours is the total amount of time in the school year that the child receives instructional programming based on IPP goals in the centre.

When planning a centre-based program for a child, ECS operators should ensure the number of program hours does not exceed what is required for the child's developmental needs prior to age 6.



- For funding purposes, a full-time program must provide 800 hours of instructional programming.
- A 3- or 4-year-old child's educational needs may be adequately met in a 475-hour program.
- An 800-hour program is an option that may be considered for a child in the Kindergarten year prior to entering Grade 1.
- Provision of extensive hours of programming (beyond what would normally be considered developmentally appropriate for a young child) should be discussed with Special Programs Branch Managers prior to the submission of an application.

Note

### **In-home Programs**

An ECS in-home program is delivered to an ECS child on a one-on-one basis through home visits in the child's home or other alternate setting by a teacher, teacher assistant, therapist and/or child development specialist. The primary purpose of an in-home program is to actively involve parents and/or caregivers (with the educational team) in the development and delivery of a comprehensive educational program for the child. For program and funding purposes, an eligible home visit must meet the following requirements:

- all home visits must be under the supervision of a certificated teacher
- a home visit must involve the parent/guardian or alternate caregiver
- a home visit must average 1.5 hours in length
- visits to the home need to support the child's overall educational program in order to count as an eligible home visit.

Important considerations for the provision of home visits:

- The number, setting and structure of home visits must be determined in consultation with the parents prior to the implementation of the program.
- Some visits to alternate caregivers can be included with the parent's agreement.
- Summary reports of visits to alternate caregivers must be shared with the parent.
- All home visits should be carefully planned and documented, as part of the child's program.

Only those home visits that meet the criteria described above may be included in the calculation of the ceiling of PUF budgets. Questions regarding criteria associated with home visits should be directed to the Special Programs Branch.

### **Combination Programs**

An ECS program for a child may consist of a combination of a centre-based program and an in-home program (e.g., 475 program hours and 10 home visits). Combination programs may be particularly effective for very young children who require extensive programming.

## Funding Ceiling

Since Program Unit Funding is intended to meet each child's individual needs, it provides for flexibility in programming. The figures in the chart below represent maximum ceilings only. Average provincial costs for Program Unit Funding are less than \$14,000 per child.

FUNDING CEILING BASED ON A FULL-TIME PROGRAM (800 HOURS)	
Number of Children Enrolled in Program Unit	2003/2004 Program Unit Rates
1	\$21,281
2	\$26,560
3	\$31,839
4	\$37,118
5	\$42,397
6	\$47,676
each additional child	\$ 5,279

A funding ceiling is calculated for each program unit. For program units that are less than full-time, the funding ceiling is pro-rated based on the number of hours, visits and months that the child is in the program. For example:

- The ceiling for a 500-hour program with one child is calculated as follows:  

$$\frac{500}{800} \times \$21,281 = \$13,301$$
- The ceiling for a 400-hour program with 9 home visits is calculated as follows:  

$$\left( \frac{400}{800} + \frac{9}{36} \right) \times \$21,281 = \$15,961$$
- The ceiling for a 6-month program, if the child is in a full program ending on June 30, is:  

$$\frac{6}{10} \times \$21,281 = \$12,769$$

When a child leaves a program before the end date specified, a letter of notification must be submitted to the School Finance Branch outlining the following information:

- the child's program start date and end date; and
- an estimated cost of the child's program up to the time of departure. If no cost estimate is provided, the approved budget will be pro-rated based on the months the child was in attendance at the program.

The original approved budget total and ceiling will then be reduced.



## Program Unit Funding Budget Page

For descriptions of specific budget areas on the budget form, refer to the *Funding Manual for School Authorities for the 2003/2004 School Year*, Section 2.5 for private ECS operators or Section 1.7 for school jurisdictions.

Special Programs Branch staff approve the Program Unit Funding budget. The following are considered by Special Programs Branch staff and include points for ECS operators to consider prior to the submission of the budget for each Program Unit Funding application.

### Instruction — Salaries and Wages

- ☐ Is there a relationship between the number of hours claimed for a child (as indicated on Form 01AL2.5a: Details of Children in Program Units) (e.g., 475-hour program) and the number of hours claimed for a teacher assistant (as indicated on Form 01AL2.5a: Program Unit Funding (PUF) Budget) (allowing for an additional 10% for preparation time for each child)?
- ☐ If the teacher assistant participates in home visits are the hours for home visitation (allowing for an additional 10% for preparation time) included?

### Note

The ECS teacher's salary is not included as part of program unit cost. ECS Basic Instruction funding is provided to support the cost of hiring a certificated teacher. (A teacher's salary is included for designated special education ECS programs only).

### Instruction — Services Purchased

- ☐ Are the services purchased clearly specified and reasonable in cost?
- ☐ Has the ECS operator considered all models of service delivery?
- ☐ Are the services included in program unit costs tied directly to the goals and objectives stated in the child's IPP?

### Transportation

- ☐ Has the ECS operator accessed Alberta Learning's transportation funding by November 30?
- ☐ Is the operator claiming only those transportation costs that exceed the transportation funding?
- ☐ If the child's program started after September 30, has the operator claimed all transportation costs under Program Unit Funding?

### Capital Items

- ☐ Has a letter of recommendation from a specialist that indicates how the capital item addresses specific goals and objectives of the child's IPP been submitted with the Program Unit Funding application?
- ☐ Have capital costs been submitted (for the required prior approval) to the Special Programs Branch?

## Other Considerations

- Program Unit Funding applications must be submitted before January 1 of the program year.
- ECS operators should plan and budget carefully. Revisions to budgets will only be considered in exceptional circumstances.
- The final Program Unit Funding amount paid will be the lesser of the program unit ceiling, approved budget amount or the actual costs.
- Program Unit Funding is available for each eligible child with a severe disability for a maximum of 3 years. *Partial years are considered part of the 3 years*; e.g., a 2-month program in 2003/2004 represents one year of funding.
- A maximum of 800 program hours, 36 in-home visits, or a combination of the two, per year, will be funded.
- Applications for children who are diagnosed or registered after January 1 will be accepted until May 1.

### Designated special education ECS programs

- Where at least 70% of the ECS children served have severe disabilities, the designated special education ECS programs may include all program costs in their Program Unit budget (except capital building costs and other fixed costs that would still be incurred if the program did not operate).
- Other revenues such as Basic Instruction and Transportation funding will be applied to the program costs.

### School Jurisdictions

- Payments to school jurisdictions are distributed on a monthly basis at 8.33% a month with the exception of January and August, which are at 8.35%.

### Private ECS Operators

- For Private ECS Operators, the Program Unit Funding payment schedule is:
  - on receipt of budget (58.33% advance)
  - in April (80% less previous payment )
  - on approval of final costs (100% less previous payments). Final payment of the approved budget is paid upon submission of the Audited Financial Statement and is the lesser of the total approved budget, actual expenditures and the approved ceiling.

# ECS TRANSPORTATION FUNDING

## Regular ECS Transportation

ECS Transportation funding is provided for a child who can be transported by conventional means; i.e., school bus, public transit or a parent. Regular ECS Transportation funding is provided at \$436 per eligible transported child. This funding is claimed on the ECS Transportation application form. For further details, refer to the *Funding Manual for School Authorities for the 2003/2004 School Year*, Section 2.6.

## Special Transportation

Funding for transportation to and from school is provided for a child who requires special transportation; e.g., handi-bus, when, because of the severity of the child's disability or because of the child's age, the child cannot ride regular rural or urban transportation.

For 2003/2004, Special Transportation funding is provided at \$11.74 for each round trip. This funding is claimed on the ECS Transportation application form and deducted as revenue from the cost of transportation submitted on the Program Unit Funding application. Program Unit Funding covers transportation costs that exceed the Special Transportation funding.

**Note:** Special Transportation funding is not available for children whose programs start after September 30. Children who are identified as eligible for Program Unit Funding after September 30 may have their transportation costs claimed as an expense under Program Unit Funding. For further details on Special Transportation funding, refer to the *Funding Manual for School Authorities for the 2003/2004 School Year*, Section 2.7.

## In-home Transportation

Transportation funding is provided for each scheduled visit that is made by a teacher, a therapist, a child development specialist or a teacher assistant to the home of a child enrolled in an ECS in-home program.

- For 2003/2004, In-home Transportation funding is paid for a maximum of 36 visits at \$11.74 for each round trip.
- The amount of \$11.74 can be claimed for each round trip, regardless of the actual cost of the trip. For example, a round trip in-home visit may cost only \$2.00 but the ECS operator will claim the full amount of \$11.74 for each in-home visit to a maximum of 36 in-home visits.
- Local policies will determine the transportation rate that will be provided to the in-home service provider, keeping in mind that even if the service provider has more than 36 in-home visits, the maximum amount the ECS Operator can claim is \$423.36 (36 in-home visits x \$11.74).
- Funding is claimed on the ECS Transportation application form and deducted as revenue from the cost of transportation on the Program Unit Funding application.

**Note**

- Program Unit Funding covers transportation costs that exceed the In-home Transportation funding.

**Note:** Special Transportation funding is not available for children whose programs start after September 30. Special Transportation expenses for these children may be claimed as a Program Unit Funding cost. For further details, refer to the *Funding Manual for School Authorities for the 2003/2004 School Year*, Section 2.7.

## Field Trips and Other Transportation

Transportation costs incurred for field trips or other activities can be claimed as part of transportation costs under Program Unit Funding. Field trips claimed must be those trips provided in addition to field trips for the regular ECS class. In-program transportation costs must be specified. In-program transportation includes transportation of the child from one program to another program or agency as part of the child's IPP.

## REPORTING OF ACTUAL COSTS

At the end of the school year, ECS operators shall report total actual Program Unit Funding expenditures for all program units in the following manner.

- Private ECS operators shall report on Schedule 3 of the Audited Financial Statements by November 30.
- School jurisdictions shall report on the ECS Program Unit Funding Summary of Actual Expenditures form provided in the *Funding Manual for School Authorities for the 2003/2004 School Year* by September 22.

## OTHER ECS FUNDING

### Basic Instruction Funding

Basic Instruction funding is paid on behalf of all eligible ECS children in approved ECS programs to support day-to-day operating costs that include the provision of a qualified teacher, an approved facility, appropriate equipment and materials, and an administrative support structure. For 2003/2004, funding is provided at \$2,227 for each child. For additional information, refer to the *Funding Manual for School Authorities for the 2003/2004 School Year*, Section 2.1.



## Funding for Children with Mild/Moderate Disabilities

Funding for children with mild/moderate disabilities is provided in addition to the Basic Instruction funding. Identified children must be at least 3 years 6 months of age on September 1 and less than 6 years of age on September 1. To receive this funding a child must be properly identified to Learning Information Exchange Services as having a mild/moderate disability (exceptional code 30). Supporting documentation and an IPP are required for each child. For 2003/2004, funding of \$2,111 is provided for each eligible child. Please refer to the *Funding Manual for School Authorities for the 2003/2004 School Year* for additional information on funding for children with mild/moderate disabilities.

## Program Enhancement Projects (PEP)

Funding is provided to ECS operators for special programs and services to meet the learning requirements of children who are economically or socially disadvantaged.

Alberta Learning is currently undergoing a transition to the Renewed Funding Framework. Funding to meet the needs of children and students who are disadvantaged because of social and/or economic conditions will be addressed within this framework. PEP funding approved during the previous funding cycle will be granted a one-year extension during the 2003/2004 school year.

For additional information, refer to the *Funding Manual for School Authorities for the 2003/2004 School Year*, Section 2.4.



## APPENDIX A

### Checklist for Development of Local Special Needs Policies

ECS operators are expected to develop local special needs policies consistent with those outlined in Early Childhood Services Policy 1.1.3 (April 29, 2002). The following checklist may be used to determine the strength of these local policies.

- ☐ We inform the community that ECS has a high priority for serving children with disabilities.
- ☐ We demonstrate our commitment to this priority by reserving space for children with special needs in our class enrolment.
- ☐ We have procedures identified to screen/assess children who are currently attending ECS programs who may have disabilities.
- ☐ We have procedures identified to refer children with severe disabilities for professional assessment/diagnosis.
- ☐ We have developed policies, procedures and timelines for tasks pertaining to ECS children with special needs.
- ☐ We have policies and procedures to reflect mandatory and discretionary criteria related to accessing Program Unit Funding; e.g., Individualized Program Plans.
- ☐ We have policies and procedures related to Human Resources, e.g., hiring of a teacher, teacher assistant, professional development for teachers/teacher assistants and other ECS staff.
- ☐ We have policies and procedures related to transportation of children with special needs.
- ☐ We have policies and procedures governing the use of funding related to parent education opportunities that support the development of their child (e.g., workshops).
- ☐ We have policies and procedures related to the following:
  - confidentiality
  - storage of records
  - informed consent for specialized assessments
  - transference of records
  - financial record-keeping
  - purchasing equipment for children with special needs
  - handling medication
  - emergency preparedness (child specific; program specific).
- ☐ We have policies and procedures establishing roles and responsibilities of staff providing special education services.
- ☐ We have written procedures for dispute resolution.

## APPENDIX B

### Summary of Documentation for Eligibility for PUF

Name of School Jurisdiction/ECS Operator

Code	Name of child	DOB mo/day/yr	Description of functioning and I.Q. or Adaptive Behaviour	Date of assessment and profile	Level of support involved	Is this child – (check more than one box if applicable)
41						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
41						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
41						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
41						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
41						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
41						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval

## Name of School Jurisdiction/ECS Operator

Code	Name of child	DOB mo/day/yr	Diagnosis and/or description of behaviour (types of behaviour & severity)	Date of assessment and profile	Description of needs in school setting/level of support	Is this child – (check more than one box if applicable)
42						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
42						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
42						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
42						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
42						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
42						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval

## Name of School Jurisdiction/ECS Operator

Code	Name of child	DOB mo/day/yr	State combination of 2 or more non- associated (indicate syndrome if applicable; e.g., Down Syndrome, Cerebral Palsy)	Date of assessments and names of tests	Indicate recent scores; indicate which areas of disability are involved in the multiple disability (i.e., vision, hearing, cognitive)	Complete the following if the code 43 is based on language and motor delays.	Is this child – (check more than one box if applicable)
43						Exp _____ % Rec _____ % Total _____ % Phon _____ % Fine Motor _____ % Gross motor _____ %	<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
43						Exp _____ % Rec _____ % Total _____ % Phon _____ % Fine Motor _____ % Gross motor _____ %	<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
43						Exp _____ % Rec _____ % Total _____ % Phon _____ % Fine Motor _____ % Gross motor _____ %	<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
43						Exp _____ % Rec _____ % Total _____ % Phon _____ % Fine Motor _____ % Gross motor _____ %	<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval

Name of School Jurisdiction/ECS Operator

Code	Name of child	DOB mo/day/yr	Diagnosis and/or description of behaviour (types of behaviour & severity)	Date and name of professional	Description and level of dependence		Is this child – (check more than one box if applicable)
					Autism (functional needs: communication self help, socialization)	Physical/medical/neuro (describe need for assistance, support services and/or environmental modification)	
44							<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
44							<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
44							<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
44							<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
44							<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval



## Name of School Jurisdiction/ECS Operator

Code	Name of child	DOB mo/day/yr	Audiogram results	Date of assessment and profile	Level of support required	Is this child – (check more than one box if applicable)
45						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
45						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
45						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
45						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
45						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
45						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval

Name of School Jurisdiction/ECS Operator

Code	Name of child	DOB mo/day/yr	Diagnosis	Date of assessment	Accommodation	Is this child – (check more than one box if applicable)
46						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
46						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
46						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
46						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
46						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
46						<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval

## Name of School Jurisdiction/ECS Operator

Code	Name of child	DOB mo/day/yr	Name and date of test	Results	Supports Required	Is this child – (check more than one box if applicable)
47				Exp. _____ % Rec. _____ % Total _____ % Phonological _____ % Sev./Profound Level Intel. _____ %		<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
47				Exp. _____ % Rec. _____ % Total _____ % Phonological _____ % Sev./Profound Level Intel. _____ %		<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
47				Exp. _____ % Rec. _____ % Total _____ % Phonological _____ % Sev./Profound Level Intel. _____ %		<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
47				Exp. _____ % Rec. _____ % Total _____ % Phonological _____ % Sev./Profound Level Intel. _____ %		<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
47				Exp. _____ % Rec. _____ % Total _____ % Phonological _____ % Sev./Profound Level Intel. _____ %		<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval
47				Exp. _____ % Rec. _____ % Total _____ % Phonological _____ % Sev./Profound Level Intel. _____ %		<input type="checkbox"/> A Renewal <input type="checkbox"/> New <input type="checkbox"/> Pre-approval

## APPENDIX C

### References

**Alberta Learning. *Funding Manual for School Authorities for the 2003/2004 School Year*. Edmonton, AB: Alberta Learning.**

- Download from <http://www.learning.gov.ab.ca/funding>
- Purchase from the Learning Resources Centre <http://www.lrc.learning.gov.ab.ca>  
Telephone: (780) 427-5775 in Edmonton (toll-free in Alberta by dialing 310-0000)  
Fax: (780) 422-9750.

**Alberta Learning (2000). *Kindergarten Guide to Implementation: Sharing Visions, Sharing Voices*. Edmonton, AB: Learning and Teaching Resources Branch.**

- Purchase from the Learning Resources Centre (item #443440)  
<http://www.lrc.learning.gov.ab.ca>  
Telephone: (780) 427-5775 in Edmonton (toll-free in Alberta by dialing 310-0000)  
Fax: (780) 422-9750.

**Alberta Learning (Revised September 2000). *Kindergarten Program Statement*. Edmonton, AB: Alberta Learning.**

- Download from [http://www.learning.gov.ab.ca/k\\_12/curriculum/bysubject](http://www.learning.gov.ab.ca/k_12/curriculum/bysubject)
- Also available from the Alberta Learning Curriculum Standards Branch.  
Telephone: (780) 422-0628 in Edmonton (toll-free in Alberta by dialing 310-0000)  
Fax: (780) 422-3745.

**Alberta Learning. *Policy, Regulations and Forms Manual*. Edmonton, AB: Alberta Learning.**

- Download from <http://www.learning.gov.ab.ca/educationguide/pol-plan/polregs/toc.asp>

***Province of Alberta School Act* (Revised Statutes of Alberta 2000, Chapter S-3 with amendments in force as of January 1, 2002. Edmonton, AB: Queen's Printer.**

- Download from <http://www.gov.ab.ca/qp>
- Purchase from the Queen's Printer Bookstore  
Edmonton: Telephone: (780) 427-4952; Fax: (780) 452-0668  
Calgary: Telephone: (403) 297-6251; Fax: (403) 297-8450  
(toll-free in Alberta by dialing 310-0000).





# **Funding Manual Sections**

- **Section 1.7      School Jurisdictions  
ECS Program Unit Funding**
- **Section 2.5      Private ECS Operators  
Program Unit Funding**
- **Section 2.6      Early Childhood Services  
Transportation – Regular Funding**
- **Section 2.7      Early Childhood Services  
Transportation – Special Needs Funding**
- **Glossary of Terms**

ALLOCATION FORMULA

UNDER REVIEW

1. The allocation amount for each unit will be the lesser of:
  - a) the approved budget amount,
  - b) the program unit ceiling amount, and
  - c) the actual cost.
2. a) Calculation of the ceiling amount for a program unit with one child:
  - i) Centre-based program

$$\text{Program Unit Funding} = \frac{\text{Number of Centre Hours (max 800)}}{800 \text{ hrs}} \times \text{Funding Rate for one child}$$

- ii) In-home based program

$$\text{Program Unit Funding} = \frac{\text{Number of Visits (max 36)}}{36 \text{ visits}} \times \text{Funding Rate for one child}$$

- iii) Combined program – centre-based and in-home based program

$$\text{Program Unit Funding} = \left\{ \frac{\text{Number of Centre Hours (max 800)}}{800 \text{ hrs}} + \frac{\text{Number of Visits (max 36)}}{36 \text{ visits}} \right\} \times \text{Funding Rate for one child}$$

The maximum payable under this calculation is the rate for one child.

- b) Calculation of the ceiling amount for a program unit with more than one child (clustering):

Choose the **child** with the highest combination of hours and/or home visits and calculate the ceiling for this **child** as follows:

$$\text{Program Unit Funding} = \left[ \left\{ \frac{\text{Number of Centre Hours (max 800)}}{800 \text{ hrs}} + \frac{\text{Number of Visits (max 36)}}{36 \text{ visits}} \right\} \times \text{Funding Rate for one child} \right]$$

Add to this amount for each additional **child** in the unit, the following:

$$\left[ \left\{ \frac{\text{Number of Centre Hours (max 800)}}{800 \text{ hrs}} + \frac{\text{Number of Visits (max 36)}}{36 \text{ visits}} \right\} \times \text{Funding Rate for each additional child in the unit} \right]$$

- c) Maximum funding for a program unit is based on an 800-hour program or 36 in-home visits or a combination thereof.
- d) See ADDITIONAL INFORMATION at the end of this section for calculation examples.

## ALLOCATION CRITERIA

1. Program Unit Funding (PUF) may be paid to a **school jurisdiction** for each eligible **child with a severe disability** for a maximum of three years.
2. The funding amount paid will be the lesser of the program unit ceiling, the approved budget total, and the actual cost.
3. To be eligible for funding, a **child with a severe disability** must be at least 2 years 6 months of age and less than 6 years of age on September 1. **School jurisdictions** should plan the **child's** program so that the last year of PUF is the year prior to the **child's** entry into grade 1.
4. **School jurisdictions** will use the categories/codes and related definitions outlined in **students/ECS children with severe disabilities** in the Glossary of Terms to determine a **child's** disabling condition for PUF eligibility purposes.
5. A **child** receiving program unit funding is not eligible for ECS mild/moderate funding.
6. An eligible **child** can be claimed by only one **ECS operator** at a time. The **school jurisdiction** claiming the **child** is responsible for ensuring the **child** is not claimed by another **ECS operator**.
7. Eligibility for PUF will be based on all of the following:
  - a) a diagnosis of a disability/condition at the severe/profound level by qualified personnel (note: a diagnosis alone is not necessarily sufficient to qualify for funding);
  - b) documentation/assessments of the **child's** current level of functioning in the learning environment;
  - c) a current **individualized program plan (IPP)** which addresses the **child's** diagnosed needs; and
  - d) the levels of support and services being provided to the **child**.

To expedite the approval process, assessment information to support the eligibility of the **children** should be submitted with the PUF application. This information should include actual reports, summary information, or a format agreed upon with Alberta Learning. When a **school jurisdiction** is uncertain of a **child's** eligibility, the operator is encouraged to discuss the issues of the **child's** eligibility with Alberta Learning prior to making an application.

**PROCEDURES, DOCUMENTATION AND REPORTING**

1. Payment of program unit funding is based on the approval of a Program Unit Application form (Form 03AL2.5a). Applications may be submitted either on paper or using the Program Unit Funding System (PUFS). A separate PUF application should be completed for each **school** that has **children** eligible for PUF. As part of the application, an individual budget must be submitted for each program unit listed on the application. The **school jurisdiction** should provide current assessment information to support the PUF application. The completed application, with original signatures, must be submitted to School Finance. The assessment information should be sent to the Special Programs Branch.
2. The following information pertaining to **children** receiving PUF must be kept on file by **school jurisdictions**:
  - a) an **individualized program plan (IPP)** must be developed, implemented and regularly revised for each **child**; and
  - b) formal assessment documentation to support the severity of each **child's** special need (a current assessment report must be included with the PUF Application); and
  - c) informal assessment documentation reflecting current performance levels; and
  - d) plans and summaries of home visits conducted over the year; and
  - e) current budget information.
3. The deadline for applications is January 1. **School jurisdictions** should plan and budget carefully for the school year as revisions will no longer be accepted. However, extenuating circumstances may be discussed with Alberta Learning personnel. Applications for children who are diagnosed or registered after January 1 will be accepted until May 1.
4. When a **child** leaves a program before the end date specified, a letter of notification must be submitted to the School Finance Branch outlining the following information:
  - a) the **child's** program start date and end date; and
  - b) an estimated cost of the **child's** program up to the time of departure. If no cost estimate is provided, the approved budget will be pro-rated based on the months the **child** was in attendance at the program.The original approved budget total and ceiling will then be reduced.
5. When a **child with a severe disability** moves from one **ECS operator** to another, a new PUF application based on the **IPP** must be submitted by the second operator prior to May 1 of the program year.



6. At the end of each school year, **school jurisdictions** must report actual expenditures for all program unit **children** using Form 03AL2.5b, Statement of Actual Expenditure, as follows:
- Complete one statement for all program unit **children** except those program unit **children** in **designated special education ECS programs**.
  - Complete a statement for each approved **designated special education ECS program**.

The form(s) must be returned to School Finance by October 15.

7. If a **child** has a medical condition/disability which has not changed significantly since the initial diagnosis and was previously approved by Alberta Learning, current documentation outlining assessments, treatment and current level of functioning may be sufficient to ensure continuation of PUF. This information should be kept on file and available for review by Alberta Learning.

**School jurisdictions** must provide documentation to support continued PUF for previously eligible **children** with a severe communication disorder, a severe multiple disability (primarily involving language), or any other condition likely to change significantly as a result of intervention, maturation or changes within the **child's** environment. Documentation must include the following:

- a statement from the appropriate professional that the **child** continues to demonstrate a severe disability;
- description of the necessary supports and services the **child** requires as a result of the disability;
- description of the impact of the disability on the **child's** ability to function within the ECS environment.

It is the responsibility of the **school jurisdiction** to ensure that all **children** claimed under PUF meet the eligibility criteria outlined. **School jurisdictions** who are uncertain about the eligibility of a **child** are encouraged to contact the Special Programs Branch. Special Programs Branch staff will provide confirmation of eligibility.

8. A **child's** program hours and/or home visits must meet the **child's** needs. If a combined program of **school** hours and home visits is provided, the **in-home program** must include a minimum of four in-home visits in order to be included in the ceiling calculation (see example of ceiling calculation). See definition of **in-home program** in Glossary.
9. To access the full ceiling amount, the program offered must be a full time program. A full-time program must provide either 800 hours of instructional programming for a **child** in a center-based program or a minimum of 36 in-home visits for each **child** in an **in-home program** during the school year, or the equivalent combination of hours and visits.



10. 800 hours is the maximum number of hours that will be funded for ECS **children** receiving PUF. Summer programs are not eligible for PUF and should not be included as part of the 800 hour maximum.

In some exceptional circumstances, for a **child's** last year of PUF, additional program hours beyond 800 hours may be approved, based on an individual **child's** needs. A written request explaining the reason for the additional program hours must be submitted with the PUF application for approval by the Special Programs Branch. This exception will be subject to the ceiling maximum.

11. PUF is supplemental to the Basic Instruction funding. It is intended to cover the additional educational program costs required to meet the **child's** severe special needs.

When completing the budget for program unit costs, budget amounts should approximate anticipated costs. The following specifies the costs which may be included for PUF. Any exceptions to these costs should be discussed with Alberta Learning before submitting the application.

a) Instruction

- (i) Salaries, wages and employer's portion of benefits and expenditures applicable to teacher assistants directly involved in planning, implementing and evaluating the program for the **child(ren)** in the unit. The number of hours claimed here may exceed the **child's** program hours by up to 10 percent for each child within that program unit. Clustering and small group program delivery should be considered as alternatives to full-time direct one-to-one assistance.

- (ii) Services Purchased – includes services of qualified personnel in the areas of speech therapy, occupational therapy, physiotherapy, mobility training, special education consultation, psychological and other services, and assessment costs for part or all of the program which are not provided free by public service agencies. Costs should be reasonable. **School jurisdictions** must keep records of all services purchased under PUF. All options regarding service delivery should be considered. **School jurisdictions** must ensure that all services purchased are relevant to the child's educational program and are in direct support of the goals and objectives included on the child's IPP.

Special Education Consultation is a service purchased by the **school authority** to provide programming support for the ECS teacher. Examples of services provided under Special Education Consultation include IPP development and implementation, programming strategies, suggested resources and materials and support of the off-campus components of the program. Special education consultation is delivered by a certified teacher with the appropriate training and experience. On-site Special Education consultation costs are additional costs to the **school jurisdiction** that provide direct programming support. These costs will be subject to a maximum of

\$1,500 per **child** based on a full-time program. For programs less than 800 hours, the \$1,500 maximum will be pro-rated based on the program hours and/or number of eligible home visits. For example, special education consultation costs for 475 hours and 6 home visits would be calculated as:

$$\$1,500 \times \left( \frac{475}{800} + \frac{6}{36} \right) = \$1,141.$$

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Costs for special education administration may not be claimed in this category. These costs are more appropriately covered by the administration category or by basic instruction funding. **School jurisdictions** must keep records of costs and services associated with special educational consultation.

- (iii) Supplies and materials - instructional supplies and materials which are particular to the **child's** program, and are in addition to supplies purchased with basic instruction funding. Costs in this area are usually in the \$200 - \$500 range per **child**. For costs over this range, please attach a list of supplies to the application. **School jurisdictions** are encouraged to maintain a resource inventory and an equipment loan pool.
- b) **Parent Inservice** - costs for **parents** who attend in-province workshops, seminars, inservice and specialized training sessions specifically related to the **child's** program and designed to enhance the ability of **parent(s)/guardian(s)** to assist in the **child's** development. Costs in this category are usually in the \$100 - \$400 range per **child**.
- c) **Staff Inservice** - costs for teachers and teacher assistants who attend workshops, inservice, special courses and seminars related to staff responsibilities in the **child's** program and in parental assistance. Costs in this category are usually in the \$200 - \$500 range per **child**. Personnel included in Services Purchased are not eligible for Staff Inservice.
- d) **Transportation**

Funding to urban and rural districts for transportation of ECS **children** is available by submitting an application electronically under sections 1.17 (Rural), 1.18 (Special), and 1.19 (Urban). Funding to metro urban districts is available using form 03AL2.6, ECS Transportation (Regular and Special), under section 2.6. PUF will pay for any transportation costs for **children with severe disabilities not covered** by these Transportation grants. In order to determine which transportation costs are covered by PUF, all transportation costs must be listed on the PUF budget, then all transportation revenues (from the above transportation grants) must be deducted from the transportation costs. The following descriptions indicate the types of transportation costs which can be claimed and which transportation grants are available. Note: transportation claims must be submitted to School Finance by November 30 and only **children** who were enrolled by September 30 are eligible.

- (i) Transportation to and from school: Transportation funding for these costs may be claimed by metro urban districts under section 2.6 and by rural or urban districts under section 1.18 for a **child** who requires special transportation; e.g. handi-bus, when, because of the severity of his or her disability or because of the **child's** age, the **child** cannot ride regular, rural or urban transportation or under section 1.17, 1.18, 1.19 for a **child** who is transported by a regular bus. Transportation costs for **children with severe disabilities** in excess of the funding paid under section 2.6, 1.17, 1.18, or 1.19 may be claimed as transportation costs under program unit funding;
- (ii) In-Home Programs: Transportation funding for these costs may be claimed under section 2.6 for metro urban districts and under section 1.18 by rural and urban districts for each scheduled visit made by a teacher, a **child** development specialist or a teacher assistant to the home of a **child** enrolled in an ECS **in-home program**. Transportation costs in excess of the funding paid under sections 2.6 or 1.18 may be claimed as transportation costs under program unit funding;
- (iii) Other - Field Trips: Transportation costs for this area may be claimed as transportation costs under program unit funding. Field trips claimed must be those provided in addition to field trips for the regular ECS class or for a **child** who, because of his/her disability, requires special transportation on a regularly scheduled field trip; and
- (iv) In-Program: Transportation costs for this area may be claimed as transportation costs under program unit funding. In-program transportation costs must be specified and must be for transportation of the **child** from one program to another program or agency as part of the **child's Individualized Program Plan (IPP)**.

e) Operation and Maintenance

Funding for this area is now provided by Alberta Infrastructure – Plant Operations and Maintenance funding. Costs for this category may not be claimed on the PUF budget.

f) Administration

Funding for this area is now provided under Section 1.9 Funding in Transition – System Administration funding. Costs for this category may not be claimed on the PUF budget.

g) Capital: Furniture and Equipment - expenditures for specialized furniture and equipment required to meet the special needs of the **child**, which are not available free or subsidized by another source.

- (i) For any major purchase, such as computer hardware, FM systems, etc., a written recommendation from an appropriate specialist is required indicating the necessity for the equipment. The letter from the specialist should specify the relevance of the equipment to the child's educational program and how it

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directly supports the goals and objectives of the child's IPP. The letter should also include projected costs of the capital equipment. This letter should be attached to the PUF application.

- (ii) Approval by the Special Programs Branch is required for all capital expenditures.
- (iii) Expenditures should not exceed 15 percent of the budget total.
- (iv) A specialized piece of furniture or equipment no longer used by the **child** remains the property of the **school jurisdiction**, not of the **child** or **parents** of the **child**. If a **child** changes **schools** in Alberta but continues to have use for the specialized furniture or equipment, the furniture or equipment goes with the **child**.
- (v) Renovations to a building to be used for the benefit of all **children** in the instructional area are not eligible for support under this section. **School jurisdictions** receive funding for renovations through the Building Quality Restoration Program (BQRP).
- (vi) Administrative capital purchases cannot be claimed under this category.

## 12. Designated Special Education ECS programs.

These are **ECS programs** where at least 70% of ECS **children** enrolled have a severe disability. The following requirements apply for these programs:

- a) Prior approval is required to qualify for this status;
- b) Operators who qualify for this status may claim all education program costs except capital building costs;
- c) A budget based on the total education program costs must be submitted on the program unit funding application budget page for **designated special education ECS programs**;
- d) Operation & Maintenance costs: This would include costs associated with the operation and maintenance of the school facility and would also include rent costs. PUF will cover costs in this category that exceed the funding provided by Alberta Infrastructure;
- e) Administration: Reasonable costs for administration of the **ECS program** may be claimed here. Costs in this area are typically in the 6% to 12% range. Costs in this category should not include any central office admin. costs/charges covered by System Admin. Funding under Section 1.9;
- f) Capital costs must meet the specific needs of a **child** or a group of **children** to be eligible. An itemized list of capital must be included with the application if costs are claimed in this category;

- g) Alberta Learning will apply all applicable revenues to the total program costs (such as basic instruction funding, mild/moderate funding, Program Enhancement Project (PEP) funding, ECS transportation funding and other applicable revenues) to determine a net program cost total to which the program unit funding will apply;
- h) **Designated special education ECS programs** must comply with all Conditions, Requirements and Considerations outlined in Section 1.7, Program Unit Funding, of the Funding Manual. These programs must also comply with the expectations outlined in the *Standards for Special Education* and the principles contained in Alberta Learning's *Kindergarten Statement (2000)*;
- i) Applications for new programs must be submitted as a proposal to the Director of the Special Programs Branch by June 1 for approval. To be considered for this designated status, the program must have operated for at least one year. Newly designated programs will be subject to program review within the first year. The proposal should contain the following information:
- a rationale for applying for status as a **designated special education ECS program** including the potential benefits to **children** with severe special needs and their families. The rationale should also explain why the program could not operate as a regular ECS program and should highlight how receiving the designated status will resolve those issues.
  - an overview of the proposed program including population served, program format, service delivery model, support services provided, and a brief summary of the role descriptions of program staff.
  - a proposed budget completed using form 03AL2.5a. This budget should outline all estimated expenditures and projected revenues; and
- j) The status of approved **designated special education ECS programs** may be reviewed and withdrawn at any time by Alberta Learning.

## ADDITIONAL INFORMATION

1. A **child with a severe disability** who:
  - a) is at least 5 years 6 months but less than 6 years of age on September 1 of the school year in which s/he is counted; and
  - b) is eligible to enter grade 1 under the **school** entrance age policy of a **school jurisdiction**; and
  - c) has not spent 3 years in an **Early Childhood Services program**,may be eligible for PUF if, in the opinion of the **school jurisdiction** and the **parent**, an **ECS program** is the most appropriate placement for the **child**.
2. The calculation of the ceiling amount for a program unit with one child in it using examples of a centre-based program, an **in-home program** and a program based on a combination of centre hours and in-home visits is determined as follows:



Calculation of the ceiling for a <u>centre-based program</u> of 500 hours	Calculation of the ceiling for an <u>in-home based program</u> of 10 in-home visits	Calculation of the ceiling for a <u>combined program</u> based on 500 centre hours and 10 in-home visits
$\frac{500 \text{ hrs}}{800 \text{ hrs}} \times \$21,281$ $= \$13,301$	$\frac{10 \text{ visits}}{36 \text{ visits}} \times \$21,281$ $= \$5,911$	$\frac{500}{800} + \frac{10}{36} \times \$21,281$ $= \$19,212$

Note: If the calculation results in a number higher than the ceiling amount then the ceiling would apply.

3. The maximum program unit rates should be viewed as ceilings only. Provincial averages indicate the cost of most programs to be less than \$14,000 per child. Careful stewardship of funds by **school jurisdictions** is integral to the PUF program.
4. The decision to cluster or group **children** into a program unit for programming purposes should be based on the educational needs of the **children** involved. However, it is expected that operators will cluster **children** with similar needs who receive services in the same setting and at the same time whenever possible.
5. For a program unit with more than one **child**, the ceiling is calculated as follows:
  - Choose the **child** with the highest combination of hours and/or home visits. Calculate the ceiling for this **child** as follows:

$$\left[ \frac{\# \text{ hours}}{800} + \frac{\# \text{ visits}}{36} \times \$21,281 \right]$$

- To this amount, add, for each additional **child** in the program unit as follows:

$$+ \left[ \frac{\# \text{ hours}}{800} + \frac{\# \text{ visits}}{36} \times \$5,279 \right]$$

Example:

For a program unit (cluster) of three **children**, where:

- **child** #1 has 500 hours and 10 home visits
- **child** #2 has 400 hours, no home visits
- **child** #3 has 600 hours and 4 home visits

The ceiling is then calculated as follows:

$$\begin{array}{rcl}
 \left[ \frac{500}{800} + \frac{10}{36} \right] \times \$21,281 & = & \$19,212 \\
 + \left[ \frac{400}{800} \right] \times \$5,279 & = & \$2,640 \\
 + \left[ \frac{600}{800} + \frac{4}{36} \right] \times \$5,279 & = & \$4,546 \\
 \hline
 = \text{Total ceiling for the unit} & & \$26,398
 \end{array}$$

6. Funding ceilings will be adjusted when a **child** starts a program after December 31 or when a **child** leaves the program earlier than planned. In these situations, the ceiling will be the lesser of:
- a pro-rated ceiling amount of \$2,128 per month for the number of months the program runs; or
  - the ceiling amount based on the program hours and/or the # of home visits.

For example, the ceiling amount for a **child** in a four month program with 300 hours and 4 home visits would be calculated as follows:

Ceiling calculation for a 4 month program in a 10 month program year
Lesser of:
a) \$21,281 X 4/10 = \$8,512 or
b) \$21,281 X (300/800 + 4/36) = \$10,345
Ceiling amount is \$8,512

7. For **school jurisdictions** that are providing a program for a **child** with a severe disability in the regular ECS classroom:

The Basic Instruction funding, Part 1, Section 1, is paid on behalf of all **children** in an **ECS program**. Basic Instruction funding is available for **children** with a severe disability who are as young as 2 years 6 months on September 1. This funding supports the day-to-day operating costs of the program, such as teacher salaries, rent, utilities, and supplies. Since these costs would be incurred whether or not a **child** with a severe disability was in the program, they should not be included in the program unit expenditures. Ordinarily, teachers' salaries should not be included as program unit costs because the basic instruction funding supports these costs.

8. For **school jurisdictions** contracting placement in a Day Care and for Day Cares with approved ECS status the following apply:

- a) In circumstances where a **child** is placed in a day care program because the location is the best place to implement the **IPP** for the **child**, the fees only for the education component portion of the day may be claimed from PUF. The education component should reflect a typical education schedule
  - b) Costs for childcare are not eligible to be claimed under PUF.
9. **School jurisdictions** may appeal program unit funding decisions by contacting the Director of the Special Programs Branch.

## REFERENCES

*ECS Program Unit Funding: A Handbook for ECS Operators*



UNDER REVIEW

## PURPOSE

This funding provides for individual programs for **children with severe disabilities** to meet their educational needs.

## CONDITIONS

1. Program Unit Funding (PUF) may be paid to a **private ECS operator** for each eligible **child with a severe disability** for a maximum of three years.
2. The funding amount paid will be the lesser of the program unit ceiling, the approved budget total, and the actual cost.
3. To be eligible for funding, a **child with a severe disability** must be at least 2 years 6 months of age and less than 6 years of age on September 1. **Private ECS operators** should plan the **child's** program so that the last year of PUF is the year prior to the child's entry into grade 1.
4. **ECS operators** will use the categories/codes and related definitions/criteria outlined in **students/ECS children with severe disabilities** in the Glossary of Terms to determine a **child's** disabling condition for PUF eligibility purposes.
5. A **child** receiving program unit funding is not eligible for ECS mild/moderate funding.
6. An eligible **child** can be claimed by only one **ECS operator** at a time. The **ECS operator** claiming the **child** is responsible for ensuring the **child** is not claimed by another **ECS operator**.
7. Eligibility for PUF will be based on all of the following:
  - a) a diagnosis of a disability/condition at the severe/profound level by qualified personnel (note: a diagnosis alone is not necessarily sufficient to qualify for funding);
  - b) documentation/assessments of the **child's** current level of functioning in the learning environment;
  - c) a current **individualized program plan (IPP)** which addresses the **child's** diagnosed needs; and
  - d) the levels of support and services being provided to the **child**.

To expedite the approval process, assessment information to support the eligibility of the **children** should be submitted with the PUF application. This information should include actual reports, summary information, or a format agreed upon with Alberta Learning. When an **ECS operator** is uncertain of a **child's** eligibility, the operator is



encouraged to discuss the issues of the child's eligibility with Alberta Learning prior to making an application.

## REQUIREMENTS

1. Payment of program unit funding is based on the approval of a Program Unit Application form (Form 03AL2.5a). Applications may be submitted either on paper or electronically using the Program Unit Funding System (PUFS). Workshops on how to use PUFS will be held throughout the province in Fall 2003. A separate PUF application should be completed for each **school** that has **children** eligible for PUF. As part of the application, an individual budget must be submitted for each program unit listed on the application. The ECS operator should provide current assessment information to support the PUF application. The completed application, with original signatures, must be submitted to School Finance. The assessment information should be sent to the Special Programs Branch.
2. The following information pertaining to **children** receiving PUF must be kept on file by **private ECS operators** and made available to the Special Programs Branch on request:
  - a) an **Individualized Program Plan (IPP)** must be developed, implemented and regularly revised for each **child**; and
  - b) formal assessment documentation to support the severity of each **child's** special need (a current assessment report must be included with the PUF Application); and
  - c) informal assessment documentation reflecting current performance levels; and
  - d) plans and summaries of home visits conducted over the year; and
  - e) current budget information.
3. The deadline for applications is January 1. **Private ECS operators** should plan and budget carefully for the school year as revisions will no longer be accepted. However, extenuating circumstances to this rule may be discussed with Alberta Learning personnel. Applications for **children** who are diagnosed or registered after January 1 will be accepted until May 1.
4. When a **child** leaves a program before the end date specified, a letter of notification must be submitted to the School Finance Branch outlining the following information:
  - a) the **child's** program start date and end date; and
  - b) an estimated cost of the **child's** program up to the time of departure. If no cost estimate is provided, the approved budget will be pro-rated based on the months the **child** was in attendance at the program.The original approved budget total and ceiling will then be reduced.
5. When a **child with a severe disability** moves from one **ECS operator** to another, a new PUF application based on the **IPP** must be submitted by the second operator prior to May 1 of the program year.

6. All **private ECS operators** must report actual expenditures in the schedule pertaining to Early Childhood Services Program Unit Expenditures in the Audited Financial Statements which are due November 30.
7. If a **child** has a medical condition/disability which has not changed significantly since the initial diagnosis and was previously approved by Alberta Learning, current documentation outlining assessments, treatment and current level of functioning may be sufficient to ensure continuation of PUF. This information should be kept on file and available for review by Alberta Learning.

**Private ECS operators** must provide documentation to support continued PUF for previously eligible **children** with a severe communication disorder, a severe multiple disability (primarily involving language), or any other condition likely to change significantly as a result of intervention, maturation or changes within the **child's** environment. Documentation must include the following:

- a statement from the appropriate professional that the **child** continues to demonstrate a severe disability;
- description of the necessary supports and services the **child** requires as a result of the disability;
- description of the impact of the disability on the **child's** ability to function within the ECS environment.

It is the responsibility of the **private ECS operator** to ensure that all **children** claimed under PUF meet the eligibility criteria outlined. **ECS operators** who are uncertain about the eligibility of a **child** are encouraged to contact the Special Programs Branch. Special Programs Branch staff will provide confirmation of eligibility.

8. A **child's** program hours and/or home visits must meet the **child's** needs. If a combined program of **school** hours and home visits is provided, the **in-home program** must include a minimum of four in-home visits in order to be included in the ceiling calculation (see example of ceiling calculation). See the definition of **In-Home Program** in the Glossary of Terms.
9. To access the full ceiling amount, the program offered must be a full time program. A full-time program must provide either 800 hours of instructional programming for a **child** in a center based program or a minimum of 36 in-home visits for each **child** in an **in-home program** during the school year, or the equivalent combination of hours and visits.
10. 800 hours is the maximum number of hours that will be funded for ECS **children** receiving PUF. Summer programs are not eligible for PUF and should not be included as part of the 800 hour maximum.

In some exceptional circumstances, for a **child's** last year of PUF, additional program hours beyond 800 hours may be approved, based on an individual **child's** needs. A written request explaining the reason for the additional program hours must be submitted with the PUF application for approval by the Special Programs Branch. This exception will be subject to the ceiling maximum.

11. PUF is supplemental to the Basic Instruction funding. It is intended to cover the additional educational program costs required to meet the **child's** severe special needs.

When completing the budget for program unit costs, budget amounts should approximate anticipated costs. The following specifies the costs which may be included for PUF. Any exception to these costs should be discussed with Alberta Learning before submitting the application.

a) Instruction

**Revised** (i) Salaries, wages and employer's portion of benefits and expenditures applicable to teacher assistants directly involved in planning, implementing and evaluating the program for the **child(ren)** in the unit. The number of hours claimed here may exceed the **child's** program hours by up to 10 percent for each child within that program unit. Clustering and small group program delivery should be considered as alternatives to full-time direct one-to-one assistance.

**Revised** (ii) Services Purchased – includes services of qualified personnel in the areas of speech therapy, occupational therapy, physiotherapy, mobility training, special education consultation, psychological and other services, and assessment costs for part or all of the program which are not provided free by public service agencies. Costs should be reasonable. Operators must keep records of all services purchased under PUF. All options regarding service delivery should be considered. Operators must ensure that all services purchased are relevant to the child's educational program and are in direct support of the goals and objectives included on the child's IPP.

Special Education Consultation is a service purchased by the **private ECS operator** to provide programming support for the ECS teacher. Examples of services provided under Special Education Consultation include IPP development and implementation, programming strategies, suggested resources and materials and support of the off-campus components of the program. Special education consultation is delivered by a certificated teacher with the appropriate training and experience. On-site Special Education consultation costs are additional costs to the **private ECS operator** that provide direct programming support. These costs will be subject to a maximum of \$1,500 per **child** based on a full-time program. For programs less than 800 hours, the \$1,500 maximum will be pro-rated based on the program hours and/or number of eligible home visits. For example, special education consultation costs for 475 hours and 6 home visits would be calculated as:  $\$1,500 \times \left( \frac{475}{800} + \frac{6}{36} \right) = \$1,141$ .

**Revised** Costs for special education administration may not be claimed in this category. These costs are more appropriately covered by the administration category or by basic instruction funding. Operators must keep records of costs and services associated with special educational consultation.



- (iii) Supplies and materials - instructional supplies and materials which are particular to the **child's** program, and are in addition to supplies purchased with basic instruction funding. Costs in this area are usually in the \$200 - \$500 range per **child**. For costs over this range, please attach a list of supplies to the application. **ECS operators** are encouraged to maintain a resource inventory and an equipment loan pool.
- b) **Parent Inservice** - costs for **parents** who attend in-province workshops, seminars, inservice and specialized training sessions specifically related to the **child's** program and designed to enhance the ability of **parent(s)/guardian(s)** to assist in the **child's** development. Costs in this category are usually in the \$100 - \$400 range per **child**.
- c) **Staff Inservice** - costs for teachers and teacher assistants who attend workshops, inservice, special courses and seminars related to staff responsibilities in the **child's** program and in parental assistance. Costs in this category are usually in the \$200 - \$500 range per **child**. Personnel included in Services Purchased are not eligible for Staff Inservice.
- d) **Transportation**

Funding for transportation of ECS **children** is available by separate application (using form 03AL2.6) through ECS Special Needs Transportation Funding (Section 2.7) and through ECS Regular Transportation Funding (Section 2.6). PUF will pay for any transportation costs not covered by these Transportation grants. In order to determine which transportation costs are covered by PUF, all transportation costs must be listed on the PUF budget, then all transportation revenues (from the above transportation grants) must be deducted from the transportation costs. The following descriptions indicate the types of transportation costs which can be claimed and which transportation grants are available. Note: transportation claims must be submitted to School Finance by November 30 and only **children** who were enrolled by September 30 are eligible.

- (i) Transportation to and from school: Transportation funding for these costs may be claimed under section 2.7 for a **child** who requires special transportation; e.g. handi-bus, when, because of the severity of his or her disability or because of the **child's** age, the **child** cannot ride regular transportation or be transported under section 2.6 by a regular bus. Transportation costs in excess of the funding paid under section 2.6 or 2.7 may be claimed as transportation costs under program unit funding;
- (ii) In-Home Programs: Transportation funding for these costs may be claimed under section 2.7 for each scheduled visit made by a teacher, a **child** development specialist or a teacher assistant to the home of a **child** enrolled in an ECS **in-home program**. Funding provided under section 2.7 is based on the number of home visits up to a maximum of 36 visits. Transportation costs in excess of the funding paid under section 2.7 may be claimed as transportation costs under program unit funding;

- (iii) Other - Field Trips: Transportation costs for this area may be claimed as transportation costs under program unit funding. Field trips claimed must be those provided in addition to field trips for the regular ECS class or for a **child** who, because of his/her disability, requires special transportation on a regularly scheduled field trip; and
- iv) In-Program: Transportation costs for this area may be claimed as transportation costs under program unit funding. In-program transportation costs must be specified and must be for transportation of the **child** from one program to another program or agency as part of the **child's Individualized Program Plan (IPP)**.

e) Operation and Maintenance

Funding for this area is now provided under Section 2.10 – Plant Operations and Maintenance funding. Costs for this category may not be claimed on the PUF budget.

f) Administration

Funding for this area is now provided under Section 2.9 – ECS Administration funding. Costs for this category may not be claimed on the PUF budget.

g) Capital: Furniture and Equipment - expenditures for specialized furniture and equipment required to meet the special needs of the **child**, which are not available free or subsidized by another source.

Revised

- (i) For any major purchase, such as computer hardware, FM systems, etc., a written recommendation from an appropriate specialist is required indicating the necessity for the equipment. The letter from the specialist should specify the relevance of the equipment to the child's educational program and how it directly supports the goals and objectives of the child's IPP. The letter should also include projected costs of the capital equipment. This letter should be attached to the PUF application.
- (ii) Approval by the Special Programs Branch is required for all capital expenditures.
- (iii) Expenditures should not exceed 15 percent of the budget total.
- (iv) A specialized piece of furniture or equipment no longer used by the **child** remains the property of the **private ECS operator**, not of the **child** or **parents** of the **child**. If a **child** changes **schools** in Alberta but continues to have use for the specialized furniture or equipment, the furniture or equipment goes with the **child**.
- (v) Renovations to a building to be used for the benefit of all **children** in the instructional area are not eligible for support under this section. **School**



**jurisdictions** receive funding for renovations through the Building Quality Restoration Program (BQRP).

- (vi) Administrative capital purchases cannot be claimed under this category.

## 12. Designated Special Education ECS programs.

These are ECS programs where at least 70% of ECS **children** enrolled have a severe disability. The following requirements apply for these programs:

- a) Prior approval is required to qualify for this status;
- b) Operators who qualify for this status may claim all education program costs except capital building costs;
- c) A budget based on the total education program costs must be submitted on the program unit funding application budget page for **designated special education ECS programs**;
- d) Operation & Maintenance costs: This would include costs associated with the operation and maintenance of the school facility and would also include rent costs;
- e) Administration: Reasonable costs for administration of the **ECS program** may be claimed here. Costs in this area are typically in the 6% to 12% range. System Administration Funding revenues will be applied to these costs as per item (g).
- f) Capital costs must meet the specific needs of a **child** or a group of **children** to be eligible. An itemized list of capital must be included with the application if costs are claimed in this category;
- g) Alberta Learning will apply all applicable revenues to the total program costs (such as basic instruction funding, mild/moderate funding, Program Enhancement Project (PEP) funding, ECS transportation funding and other applicable revenues) to determine a net program cost total to which the program unit funding will apply;
- h) **Designated special education ECS programs** must comply with all Conditions, Requirements and Considerations outlined in Section 2.5, Program Unit Funding, of the Funding Manual. These programs must also comply with the expectations outlined in the *Standards for Special Education* and the principles contained in Alberta Learning's *Kindergarten Statement (2000)*;
- i) Applications for new programs must be submitted as a proposal to the Director of the Special Programs Branch by June 1 for approval. To be considered for this designated status, the program must have operated for at least one year. Newly designated programs will be subject to program review within the first year. The proposal should contain the following information:

- a rationale for applying for status as a **designated special education ECS program** including the potential benefits to **children** with severe special needs and their families. The rationale should also explain why the program could not operate as a regular ECS program and should highlight how receiving the designated status will resolve those issues.
  - an overview of the proposed program including population served, program format, service delivery model, support services provided, and a brief summary of the role descriptions of program staff.
  - a proposed budget completed using form 03AL2.5a. This budget should outline all estimated expenditures and projected revenues; and
- j) The status of approved **designated special education ECS programs** may be reviewed and withdrawn at any time by Alberta Learning.

## CONSIDERATIONS

### 1. A child with a severe disability who:

- a) is at least 5 years 6 months but less than 6 years of age on September 1 of the **school** year in which s/he is counted; and
- b) is eligible to enter grade 1 under the **school** entrance age policy of a **school jurisdiction**; and
- c) has not spent 3 years in an **Early Childhood Services program**,

may be eligible for PUF if, in the opinion of the **school jurisdiction, parent and private ECS operator**, an **ECS program** is the most appropriate placement for the child.

2. The calculation of the ceiling amount for a program unit with one child in it using examples of a centre-based program, an **in-home program** and a program based on a combination of centre hours and in-home visits is determined as follows:

Calculation of the ceiling for a <u>centre-based program</u> of 500 hours	Calculation of the ceiling for an <u>in-home based program</u> of 10 in-home visits	Calculation of the ceiling for a <u>combined program</u> based on 500 centre hours and 10 in-home visits
$\begin{array}{rcl} 500 \text{ hrs} & \times & \$21,281 \\ 800 \text{ hrs} & & \\ \hline = & & \$13,301 \end{array}$	$\begin{array}{rcl} 10 \text{ visits} & \times & \$21,281 \\ 36 \text{ visits} & & \\ \hline = & & \$5,911 \end{array}$	$\begin{array}{rcl} 500 & + & 10 \\ 800 & & 36 \\ \hline & \times & \$21,281 \\ \hline = & & \$19,212 \end{array}$

Note: If the calculation results in a number higher than the ceiling amount then the ceiling would apply.

3. The maximum program unit rates should be viewed as ceilings only. Provincial averages indicate the cost of most programs to be less than \$14,000 per child. Careful stewardship of funds by **private ECS operators** is integral to the PUF program.

4. The decision to cluster or group **children** into a program unit for programming purposes should be based on the educational needs of the **children** involved. However, it is expected that operators will cluster **children** with similar needs who receive services in the same setting and at the same time whenever possible.
5. For a program unit with more than one **child**, the ceiling is calculated as follows:
  - Choose the **child** with the highest combination of hours and/or home visits.

Calculate the ceiling for this **child** as follows:

$$\left[ \left\{ \frac{\# \text{ hours}}{800} + \frac{\# \text{ visits}}{36} \right\} \times \$21,281 \right]$$

- To this amount, add, for each additional **child** in the program unit as follows:

$$+ \left[ \left\{ \frac{\# \text{ hours}}{800} + \frac{\# \text{ visits}}{36} \right\} \times \$5,279 \right]$$

Example:

For a program unit (cluster) of three **children**, where:

- **child** #1 has 500 hours and 10 home visits
- **child** #2 has 400 hours, no home visits
- **child** #3 has 600 hours and 4 home visits

The ceiling is then calculated as follows:

$$\begin{aligned} & \left[ \frac{500}{800} + \frac{10}{36} \right] \times \$21,281 = \$19,212 \\ & + \left[ \frac{400}{800} \right] \times \$5,279 = \$2,640 \\ & + \left[ \frac{600}{800} + \frac{4}{36} \right] \times \$5,279 = \$4,546 \\ & \hline & = \text{Total ceiling for the unit} \quad \$26,398 \end{aligned}$$

6. Funding ceilings will be adjusted when a **child** starts a program after December 31 or when a **child** leaves the program earlier than planned. In these situations, the ceiling will be the lesser of:
  - a) a pro-rated ceiling amount of \$2,128 per month for the number of months the program runs; or

- b) the ceiling amount based on the program hours and/or the # of home visits. For example, the ceiling amount for a **child** in a four month program with 300 hours and 4 home visits would be calculated as follows:

Ceiling calculation for a 4 month program in a 10 month program year
Lesser of:
a) $\$21,281 \times 4/10 = \$8,512$ or
b) $\$21,281 \times (300/800 + 4/36) = \$10,345$
Ceiling amount is \$8,512

7. For **ECS operators** who are providing a program for a **child** with a severe disability in the regular ECS classroom:

The Basic Instruction funding, Part 2, Section 1, is paid on behalf of all **children** in an **ECS Program**. Basic Instruction funding is available for **children** with a severe disability who are as young as 2 years 6 months on September 1. This funding supports the day-to-day operating costs of the program, such as teacher salaries, rent, utilities, and supplies. Since these costs would be incurred whether or not a **child** with a severe disability was in the program, they should not be included in the program unit expenditures. Ordinarily, teachers' salaries should not be included as program unit costs because the basic instruction funding supports these costs.

8. For **ECS operators** contracting placement in a Day Care and for Day Cares with approved ECS status the following apply:
- In circumstances where a **child** is placed in a day care program because the location is the best place to implement the **IPP** for the **child**, the fees only for the education component portion of the day may be claimed from PUF. The education component should reflect a typical education schedule.
  - Costs for **child** care are not eligible to be claimed under PUF.
9. **ECS operators** may appeal program unit funding decisions by contacting the Director of the Special Programs Branch.

## REFERENCES

*ECS Program Unit Funding: A Handbook for ECS Operators*





## PURPOSE

This funding enables **private ECS operators** to provide transportation for **ECS children** to and from their **ECS program**.

## CONDITIONS

1. **Children** who reside at least 2.4 kilometres from the **ECS program** in which they are enrolled will be eligible for transportation funding.
2. A **child with special needs** (mild, moderate or severe) who requires transportation to and from **school** (Condition #1 does not apply for these **children**) is eligible for this funding if they are able to ride regular transportation. If a claim is made under this section, no other transportation funding to and from the **ECS program** may be claimed.
3. Transportation costs incurred for field trips or other activities cannot be claimed under this funding. For **children with severe disabilities**, these costs can be claimed under the Program Unit Funding (PUF).

## REQUIREMENTS

1. A **private ECS operator** that claims ECS regular transportation funding must transport, or make arrangements for the transportation of, **children** attending **ECS programs**.
2. If the transportation of **children** is not done by the **private ECS operator**, then a contract or signed agreement must be in place with the company or person(s) transporting the **children**.
3. To apply for regular ECS transportation funding, **private ECS operators** are required to submit to School Finance by November 30, Form 03AL2.6, **Early Childhood Services** Transportation application. **School jurisdictions** that provide transportation for an ECS **child** will claim the **child** as an **eligible transported ECS child** under rural transportation, urban transportation or metro urban transportation block. For further details please refer to Section 1.17, Rural Transportation; Section 1.19, Urban Transportation; and Section 1.20, Metro Urban Transportation Block.
4. For **ECS programs** beginning in September, the **count date** for transportation funding is September 30.
5. For ECS programs beginning after September 30, the **count date** for transportation will be the last **operating day** of the month in which the program begins. Form 03AL2.6 must be submitted to School Finance within three weeks of that date.

6. **ECS children** registered after the **count date** are not eligible for regular transportation funding.

### CONSIDERATIONS

1. A **private ECS operator** may receive transportation funding for each **ECS child** eligible for transportation and transported by:
  - a) a **school bus**;
  - b) a **public transit system**; or
  - c) a **parent** where the **private ECS operator** does not provide bus services.
2. **Private ECS operators** may enter into agreements with **school jurisdictions** for the transportation of **children** enrolled in their programs. Funding for these **children** will be claimed by the **school jurisdictions** providing the transportation service.
3. A **private ECS operator** providing transportation to and from an **ECS program** may charge the **parent** of a **child** a fee for the transportation service. The amount of the fee shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Learning.
4. Regular transportation funding is calculated by multiplying the number of **eligible transported ECS children** by the regular transportation rate for **private ECS operators**.

Revised





## PURPOSE

This funding is provided to **private ECS operators** and metro urban boards for the transportation of **children with disabilities** to and from an **ECS program** who can not be accommodated by regular transportation. This funding also provides for the transportation of a teacher, a child development specialist, or a teacher assistant to the home of a **child** enrolled in an **in-home program**.

## CONDITIONS

### 1. Special Transportation

- a) **Private ECS Operators** and metro urban boards may receive special transportation funding for **ECS children with disabilities** who cannot be accommodated by regular transportation because of their disabilities and, therefore, require special transportation, such as a handi-bus.
- b) Special transportation funding is also provided for **ECS children with special needs** who, because of their young age, are not able to ride regular transportation. This includes children with a severe disability (ages 2.5 to 4.5), and children with a mild or moderate disability and children who are gifted and talented (ages 3.5 to 4.5).
- c) Program or **school** location shall not be considered when determining eligibility for this funding.

### 2. A **student with a disability** who is eligible to enter grade 1 and is at least 5 years 6 months on September 1 cannot be counted for ECS transportation. These **funded students** are to be counted and claimed for transportation by the **school jurisdiction** under the rural or urban transportation funding in Part 1.

### 3. In-home Program Transportation

- a) For the purpose of this section, in-home transportation means transportation for each scheduled visit made by a teacher, a child development specialist, or a teacher assistant to the home of a **child with a disability** enrolled in an **in-home program**.
- b) In-home transportation funding will not be paid for more than the following number of visits to any one home during a program period:
  - (i) 36 visits in the case of a program unit **child**, or
  - (ii) 22 visits in the case of a **child with a mild or moderate disability**.

4. Transportation costs incurred for field trips or in-program activities cannot be claimed under this funding. For **children with severe disabilities** these costs may be claimed under Program Unit Funding.

## REQUIREMENTS

1. An **ECS operator** that claims ECS special transportation funding must transport, or make arrangements for the transportation of **children with special needs** attending the **ECS program**.
2. If the transportation of **children with special needs** is not done by the **ECS operator**, then a contract or signed agreement must be in place with the company or person(s) transporting the **children**.
3. **Private ECS operators** and metro urban boards must submit to School Finance, by November 30, Form 03AL2.6, the **Early Childhood Services** Transportation (Regular and Special) application form. Urban and Rural **School Jurisdictions** should claim Special Transportation funding for **children with special needs** according to Requirement #1, in Section 1.18 (Special Transportation Funding).

The special transportation funding provided for **ECS children** is calculated by multiplying the number of **children with special needs** who require special transportation because of their disability or young age by the number of program operation days. The total transportation days are multiplied by the special transportation rate. **Private ECS operators** and metro urban boards must return the completed form to School Finance.

Funding for in-home visits made by a teacher or other professional is calculated by multiplying the number of scheduled in-home visits by the special transportation rate.

4. **Private ECS operators** and metro urban boards are to maintain records of:
  - names of **children** transported;
  - number of days each individual **child** is transported;
  - number of in-home visits;
  - actual costs of transportation; and
  - special transportation provided.

### For **ECS programs** beginning in September:

5. The **count date** for transportation funding is September 30. The completed form 03AL2.6 must be submitted to School Finance by November 30.

### For **ECS programs** beginning after September 30:

6. The **count date** for transportation will be the last **operating day** in the month in which the program begins. Form 03AL2.6 must be submitted to School Finance within three weeks of that **count date**.

7. **ECS children with special needs** registered after the **count date** are not eligible for special transportation funding. Transportation costs for **ECS children with severe disabilities** eligible to receive PUF may be claimed as a Program Unit expense.

### CONSIDERATIONS

1. A **private ECS operator** or a metro urban board providing special transportation to and from an **ECS program** may charge the **parent** of a **child** a fee for the transportation service. The amount of the fee shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Learning.





**ACTIVITY PROGRAM** for the purpose of funding is defined as a co-curricular activity outside of, but usually complimentary to, the regular curriculum and offering a high standard of professional training. This activity should be one requiring intensive training.

**ALTERNATIVE FRENCH LANGUAGE PROGRAMS** means a program offered under Sections 11 and/or 21(1)(a) of the *School Act* where French is used as the language of instruction.

- ECS – 238 hours (50 percent) of the instructional time using French as the language of instruction.
- Elementary – 475 hours (50 percent) of the instructional time using French as the language of instruction.
- Junior High – 380 hours (40 percent) of the instructional time using French as the language of instruction.
- Senior High – 250 hours (10 credits) per year using French as the language of instruction.

This is commonly referred to as French Immersion Programs.

**AUDITION** for the purpose of funding means a trial performance in which an actor, singer, dancer or other performer demonstrates prowess in his or her abilities and the audition results are used to determine entry qualification.

**BLENDED PROGRAM** means an educational program consisting of two distinct parts:

1. A **school**-provided program where a teacher employed by a **school board** or accredited **private school** is responsible for providing the delivery and evaluation of courses; and
2. A Home Education Program that meets the requirements of the *Home Education Regulation*.

**BOARD** means the board of trustees of a district, **division**, or Francophone Regional Authority.

**CHALLENGE ASSESSMENTS** for the purpose of claiming credit enrolment units (CEUs) are available for high school courses. Local **school authorities** may use **challenge assessments** to provide students with a means of receiving credits and a final mark for courses in which they already possess the knowledge, skills and attitudes identified in the program of studies and when this assessment is in the students' best interests.

**CHARTER** means a charter approved under Section 34(1) of the *School Act*.

**CHARTER BOARD** means the society, or company that is named in a **charter** as the operator of a **charter school**.

**CHARTER SCHOOL** means a **school** established under Section 32 of the *School Act*.

- New**
- For the 2003-2004 school year, the following charter schools have been approved:
- Almadina School Society
  - Aurora Charter School Ltd.
  - Boyle Street Education Centre
  - Calgary Arts Academy Society
  - Calgary Girls School Society
  - Calgary Science School Society
  - CAPE – Centre for Academic and Personal Excellence Institute
  - Foundations for the Future Charter Academy School Society
  - Moberly Hall School Society
  - Mother Earth Children's Charter School Society
  - Suzuki Charter School Society
  - Westmount Charter School Society

**CHILD** is an individual whose **parent** is a resident of Alberta, and is a Canadian citizen; or

1. Lawfully admitted to Canada for permanent residence;
2. A child of a Canadian citizen; or
3. A child of an individual who is lawfully admitted to Canada for permanent or temporary residence; and
4. Who is eligible to attend an **Early Childhood Services (ECS)** program according to the table below.

**Revised**

Needs of Eligible Children	ECS Funding (maximum years provided)	*Minimum age of the child on September 1 of the school year must be:
Regular	Basic (1 year funding)	4 years 6 months
Mild or Moderate Disabilities and Gifted and Talented	Basic and Mild/Moderate (2 years funding)	3 years 6 months
Severe Disabilities	Basic and Program Unit (3 years funding)	2 years 6 months
Developmentally Immature	Basic (2 years funding)	5 years 6 months

\*ECS operators need to take into consideration the grade one **school** entrance age in the community when enrolling **children** in an ECS program. **Children** with severe disabilities will be funded for a maximum of three years while they are of ECS age. **Children** with a mild or moderate disability and **children** who are gifted and talented will be funded for a maximum of two years while they are of ECS age.

This definition does not include a **First Nations child**, but does include a **child** attending an ECS program operated by the Government of Canada or any agency of the Government of Canada or a council of a band as defined in the *Indian Act* (Canada) or any agency established by a council of a band or councils of bands with

which the Alberta **school jurisdiction** has an agreement under Section 62(2)(b) or (c) of the *School Act* for the individual.

5. An individual who is at least 5 years 6 months but less than 6 years of age on September 1 may be counted as an **ECS child** (rather than as a **funded student**) if the **school jurisdiction**, the **ECS operator** and the **parent** agree that an **ECS program** is the most appropriate placement and if one of the following applies.
  - a) the **child** has spent less than the number of years in the program for which they are eligible for funding, i.e. has received less than three years of Program Unit funding (PUF),
  - b) the **child** has not enrolled in an **Early Childhood Services (ECS) Program** prior to this age; or
  - c) the **child** has been assessed as **developmentally immature**.
6. Individuals 6 years or older, but less than 7 years old on September 1 who are in an **ECS program** and who are **developmentally immature**, or who are **children** entering an **ECS** program for the first time, are to be counted as **children**.

A **developmentally immature** individual is not considered to have special needs and should not have been identified as having special needs in prior years. If the individual has special needs then the individual is counted as a **funded student** for funding purposes.

**CHILD WITH A DISABILITY** means a **child** who is assessed and coded as having a mild, moderate or severe disability.

**CHILD WITH A MILD OR MODERATE DISABILITY** means a **child** who is assessed as having a mild or moderate cognitive disability, visual impairment, hearing impairment, emotional/behavioural disability, physical or medical disability, multiple disability, or communication disability.

**CHILD WITH A SEVERE DISABILITY** see definition of **Students/ECS Children with Severe Disabilities** in the Glossary of Terms.

**CHILD WITH SPECIAL NEEDS** means a **child** who requires an adapted or modified educational program to meet his or her exceptional needs. The **Individualized Program Plan (IPP)** provides documentation of the program and is a mandatory requirement for any child identified as a special needs child. This includes children with a mild, moderate, or severe disability and children who are gifted and talented.

**COUNT DATE** is used to determine eligibility for funding and refers to the specific date on which students and/or **children** should be counted. If the **count date** is September 30, only those enrolled on that date can be included in the count. If the



**count date** of September 30 falls on a weekend, the last **school** day in September shall be used as the **count date**.

**DENSITY** is a term used in Rural Transportation Block funding. The **density** rating for a **school jurisdiction** is calculated by dividing the **effective transportation area** in the jurisdiction by the number of weighted **eligible passengers (eligible passengers multiplied by the weighting factor for each)**.

**DESIGNATED SCHOOL** is a term used in Rural Transportation Block funding. A **designated school** is the **school** in which a **board** has enrolled a student in accordance with Section 45(2) of the *School Act*.

**DESIGNATED SPECIAL EDUCATION ECS PROGRAM** means an **ECS program** in which at least 70 percent of the **children** served have a severe disability. **ECS programs** with this designation may include **children with mild or moderate disabilities** and/or regular **ECS children**, totaling a maximum of 30 percent of their **ECS population**. The following programs have been approved for this status:

#### Revised

##### School Jurisdictions

- Black Gold Regional Division #18
- Calgary School District #19
- Edmonton School District #7
- Elk Island Public School Regional Division #14
- Grande Prairie Public School District #2357
- Greater St. Albert Catholic Regional Division #29
- Medicine Hat School District #76
- Medicine Hat Catholic #20
- Parkland School Division # 70
- Pembina Hills Regional Division #7
- Rocky View School Division #41
- Wetaskiwin Regional Division #11

##### Schools

- Ecole Bellevue
- East Elementary Early Entry Program
- Knobb Hill Elementary School
- Queen Elizabeth Elementary
- Glenrose School
- Hazeldean School
- Mayfield School
- Waverley School
- Scott Robertson School
- Tevie Millar Heritage School
- Evansdale School
- Homesteader School
- Elmwood School
- REACH Program
- Crystal Park Pre-School Program
- Vital Grandin School
- Vanier Elementary School
- Harold Pre-School
- Riverside School
- Elm Street School
- St. Louis Early Dev. Program
- Broxton Park
- Westlock Elementary Early Ed. Program
- Elizabeth Barrett School
- Early Ed. Community Center (EEEC)



Designated ECS Programs in ECS Private Operators

- Calgary Quest Children's Society
- Children's Services Centre – Red Deer
- Community Options
- Connect Society DEAF Services
- Corbett Hall Early Education Program
- ECS Learning Association/Cause & Effect
- Elves Special Needs Society
- Family Linkages
- H.O.M.E.S. - Home Opportunities for Multi-Handicapped Educational Services
- GRIT Calgary
- Horizon School
- New Heights Early Learning Services
- PACE
- Providence Child Development Centre
- Renfrew Educational Services
- Salvation Army Children's Village
- Society for the Treatment of Autism
- The Heartland Agency
- The PREP Program

**DESIGNATED SPECIAL EDUCATION PRIVATE SCHOOL** is a private school that meets the following criteria:

1. The sole purpose of the **school** is to serve students with identified special needs, and all students who are enrolled in the **school** are diagnosed with a mild, moderate, or severe disability.
2. The educational programs provided to the students require modifications or adaptations to the Program of Study, and are specified in the **Individualized Program Plans (IPP)** developed and implemented for each student; and

For the 2003/2004 school year the following **schools** are in this category:

- |   |                              |
|---|------------------------------|
| Calgary Society for Effective Education | Parkland School              |
| • Calgary Academy                       | Renfrew Educational Services |
| Calgary Quest School                    | Rundle College Academy       |
| Edmonton Academy                        | Integral Youth Counselling   |
| Elves Child Development Centre          | • The Skills Factory         |
| Foothills Academy                       | The Third Academy            |
| Horizon School                          | • Calgary                    |
| Janus Academy                           | • Lethbridge                 |
|   | • Red Deer                   |

**DEVELOPMENTALLY IMMATURE** means an individual who is eligible to enter grade one (based on the school entrance age of the **school jurisdiction**) and less than 7 years old on September 1, who is enrolled in an **ECS program** because the parent, the **ECS operator** and the **school jurisdiction** agree that an **ECS program** is the most appropriate placement for the child. In this situation the individual is counted as a **child** for funding purposes. If the individual is in a program that involves both ECS and grade one instruction, he/she may be counted either as a **child** or as a **funded student** for funding purposes. A developmentally immature individual is not considered to have special needs and should not have been identified as having special needs in prior years. If the individual has special needs then the individual is counted as a **funded student** for funding purposes.

**DISTANCE** is a term used in Rural Transportation Block funding. **Distance** refers to the **eligible transportation distance** from where each **eligible passenger** resides to their **designated school** or **school** of choice, whichever is closest.

**DIVISION** means a school division or regional division established pursuant to the current *School Act* or any predecessor *School Act* or Ordinance *School Act*.

Revised

**EARLY CHILDHOOD SERVICES (ECS) OPERATOR** for funding purposes means a board or a private ECS operator providing an approved ECS Program.

**EARLY CHILDHOOD SERVICES (ECS) PROGRAM** means an education program provided pursuant to Section 30 of the *School Act*.

**EDUCATION SERVICES AGREEMENT** means an agreement or a portion of an agreement entered into by a **school jurisdiction** under Section 62 of the *School Act* to educate students under its authority on a full-time basis. Examples of this would be tuition agreements, sponsorship agreements, and transportation agreements.

**EFFECTIVE TRANSPORTATION AREA** for the purposes of Rural Transportation Block funding means the total area in square miles in a **district** or **division** excluding:

- unpopulated Crown land, military reserves, grazing leases, provincial parks, and large bodies of water;
- townships where two or more adjacent townships have vacant land which is at least the size of a township;
- outlying townships within the jurisdiction boundary where the **school jurisdiction** provides no transportation service;
- city, town, village or hamlet with a population greater than 10,000; and
- the portion for transportation services provided by another **school jurisdiction** under a **transportation agreement**;

but including:

- any township in which a portion of the township is privately owned; and
- two square miles per mile of road corridor through vacant townships between populated areas.

**ELIGIBLE PASSENGER** for purposes of Student Transportation funding refers to an individual who is transported under Section 51 of the *School Act* and the *Student Transportation Regulation* or required to be transported to and from **school** under Section 51 of the *School Act* and the *Student Transportation Regulation* and is enrolled in a **school** of the board, as follows:

1. An aide accompanying a **student with a disability** or an **ECS child** in a program unit who is transported to and from **school**;
2. A **funded student** who:
  - a) resides within the boundaries of a **school jurisdiction** and attends a **school** operated by that **board**; or

- b) resides within the boundaries of a **school jurisdiction** and attends a **school** operated by another **board** with which the **school jurisdiction** has an **education services agreement** for that student; or
  - c) resides within the boundaries of another **school jurisdiction** with which the **board** has an existing **transportation agreement** for that individual or who has been admitted to a **school** operated by another **board** and is transported within the boundaries of that **board**; or
  - d) resides in **unorganized territory** and attends a **school** operated by a **board** adjacent to the **unorganized territory**; or
  - e) resides in **unorganized territory** and attends a **school** operated by a **board** or a **private school** with which the **school jurisdiction** adjacent to the **unorganized territory** has an existing **transportation agreement**; and
  - f) resides at least 2.4 kilometres (by the most direct route on a **highway**) from the **school** that the individual has been directed to attend pursuant to Section 45(2) of the *School Act*; or
  - g) resides at least 2.4 kilometres (by the most direct route on a **highway**) from the **school** at which the individual is attending a language program complying with Section 11 of the *School Act*; or
  - h) resides in **unorganized territory** at least 2.4 kilometres (by the most direct route on a **highway**) from the **school** that individual attends.
3. A **student with a disability** who requires transportation to and from **school**;
  4. A student who is transported by horse drawn vehicle to the **school** which the student has been directed to attend; or
  5. A **funded student** who resides within the boundaries of a **school jurisdiction** and attends a **private school** with which the **school jurisdiction** has an **education services agreement**.

**ELIGIBLE STUDENT** (for ASFF purposes as defined in the Alberta School Foundation Fund Regulation) means a student who:

- Revised
1. On September 30, meets the requirements of Section 8 of the *School Act*;
  2. Either has a **parent** who ordinarily resides in Alberta or is an **independent student** who ordinarily resides in Alberta;
  3. Is enrolled in and is attending a **school** operated by a board;
  4. Is at least 5 years 6 months but less than 20 years of age on September 1 of the year in which the student is counted;
  5. Is not a student enrolled in a **home education program**;
  6. Is not a **child** to whom an **early childhood services program** is being provided pursuant to Section 30(1)(a)(b) of the *School Act*; and



7. Is not an Indian residing on a reserve pursuant to the *Indian Act* (Canada).

**ELIGIBLE TRANSPORTATION DISTANCE** for the purposes of Rural Transportation Block funding means the **distance** each **eligible passenger** resides from his or her **designated school**. It is the one-way **distance** from the boundary at the roadway access to the residence nearest to the **school** of the quarter section or lot on which the residence of the **eligible passenger** is situated to the **designated school** in kilometres on a travelled road or public right of way on any part of which the public is ordinarily entitled or permitted to use for the passage of vehicles, but does not include privately owned laneways or roads. **Distances** that students are transported on private laneways or roads is **eligible transportation distance** only where the **eligible passenger** is wheelchair-bound, a **student with severe disabilities**, or a **child with severe disabilities**.

**ELIGIBLE TRANSPORTED ECS CHILD** is a **child** enrolled in an **ECS program** who resides at least 2.4 kilometres from the program in which the **child** is enrolled.

**EXPECTED ELIGIBLE PASSENGER** is a term used in Section 1.20 – Metro Urban Transportation Block and refers to the estimated number of **eligible passengers** calculated on the basis of enrolment and a number of factors which affect eligibility for transportation.

**FIRST NATIONS STUDENT** means an individual, usually residing on an Indian Reserve:

1. Who pursuant to the *Indian Act* (Canada) is registered as an Indian or is entitled to be registered as an Indian; and
2. For whom the educating **school jurisdiction** receives payment of a tuition fee from the band or band council which is provided by the Government of Canada in respect of that individual.

**FRANCISATION** means a program that assists students attending Francophone **schools** who do not have sufficient French language skills to succeed in **school**. **Francisation** programs are similar to ESL programs that assist students attending English-speaking **schools** who do not have sufficient English language skills to succeed in **school**.

New

**FRANCOPHONE REGIONAL AUTHORITY** means a Regional Authority for a Region established by the Minister under section 255 of the *School Act*.

**FRANCOPHONE EDUCATION PROGRAM** means a program operated by a Francophone Regional authority under Section 10 of the *School Act*.

**FRENCH AS A SECOND LANGUAGE (FSL)** means a program or course offered under Section 39 of the *School Act*.



**FRENCH FIRST LANGUAGE (FRANCOPHONE) EDUCATION** means an education program offered under Section 10(1) of the *School Act* for individuals with rights under Section 23 of the *Canadian Charter of Rights and Freedoms* to receive **school** instruction in French.

**FROZEN FUNDED STUDENT COUNT** is a snapshot of the September 30 Funded Student Count as it stands on the last business day in May each year. This count includes any add/change/deletes and cleared priority **school** conflicts that are processed by School Finance to the last business day in May each year.

**FUNDED PRIVATE SCHOOL** means an accredited private school as defined in Sec 28 (2) of the *School Act* that receives a grant under the *Learning Grants Regulation*.

**FUNDED STUDENT** means an individual who:

1. Is attending a **school** or a **blended program** in grades 1 to 12 on September 30 of the current **school** year;
  - a) operated by a **school jurisdiction** or the governing body of a **funded private school**; or
  - b) in another province operated by a board of trustees or similar governing body of a publicly funded school or separate board or a person with which the Alberta **school jurisdiction** has an agreement under Section 62 (1) or (2) of the *School Act* for the individual because he/she is a **resident student** of the **school jurisdiction** or a Charter section 23 student represented by a **francophone regional authority**; or
  - c) operated by the Government of Canada or any agency of the Government of Canada or a council of a band as defined in the *Indian Act* (Canada) or any agency established by a council of a band or councils of bands with which the Alberta **school jurisdiction** has an agreement under Section 62(2)(b) or (c) of the *School Act* for the individual because he/she is a **resident student** of the **school jurisdiction**; or
  - d) in another province or country under an **reciprocal exchange program** approved by Alberta Learning with a student from that respective province or country; and
2. Is at an age on September 1 in the school year in which he/she is counted, as follows;
  - a) At least 5 years 6 months of age and is eligible to enter grade 1 according to the school entrance policy of the **school jurisdiction** that enrolls the student, but less than 20 years of age; or
  - b) less than 5 years 6 months of age, is enrolled in grade 1, and has previously attended an Early Childhood Services (ECS) program outside of Alberta that meets the learner expectations of the Kindergarten Program Statement; or
  - c) 6 years but less than 7 years of age and who has a mild, moderate or severe disability and requires another year of ECS; or
  - d) 6 years but less than 7 years of age who is both **developmentally immature** and has special needs.

3. Is a Canadian citizen; or
  - a) lawfully admitted to Canada for permanent residence;
  - b) a child of a Canadian citizen; or
  - c) a child of an individual who is lawfully admitted to Canada as a permanent or **temporary resident**; and
4. Has a parent who ordinarily resides in Alberta (*School Act*, Section 273), or is an independent student who ordinarily resides in Alberta; and
5. Is not counted for basic instruction funding by another **school jurisdiction**, a **funded private school** or an **ECS operator** under the Learning Grants Regulation; and
6. Is not a **First Nations student** enrolled in a **school** operated by a **school jurisdiction** or the governing body of a **funded private school**; and
7. Is not a **home education student**.

Revised

**GROUP HOME** means any home operated or approved by the government and includes a treatment (therapeutic and/or specialized foster care) foster home where there is more than one individual placed in the home. **Group homes** approved as **Institutions** must provide 24 hour supervision and intensive treatment/assessment for students in a specialized, secure setting. If the **Institution's** educational facility is not located on-site in the **group home**, transportation of students to and from **school** must be supervised by **group home** staff.

**HIGHWAY** means any thoroughfare, street, road, trail, avenue, parkway, driveway, pedway, lane, square, bridge, or other place, whether publicly or privately owned, any part of which the public is ordinarily entitled or permitted to use for the passage or parking of vehicles; and

1. Includes:
  - a) a sidewalk (including the boulevard portion of the sidewalk); and
  - b) if a **highway** right of way is contained between fences or between a fence and one side of the roadway, all the land between the fences, or all the land between the fence and the edge of the roadway, as the case may be.

**HOME EDUCATION STUDENT** means an individual who:

1. Meets the requirements of the *Home Education Regulation* (AR 126/99); and
2. Is under the supervision of a **school jurisdiction** or a **funded private school** and living in Alberta on September 30; and
3. Is 5 years and 6 months or greater, but less than 20 years of age on September 1 in the **school** year in which s/he is counted; and
4. Is a Canadian citizen; or

- a) lawfully admitted to Canada for permanent residence;
  - b) a child of a Canadian citizen; or
  - c) a child of an individual who is lawfully admitted to Canada for permanent or temporary residence; and
5. Has a **parent** who ordinarily resides in Alberta, or is an **independent student** who ordinarily resides in Alberta; and
  6. Is not counted by another **school jurisdiction** or **funded private school** for basic instruction funding, or an **ECS operator** under the *Learning Grants Regulation*.

**INDEPENDENT STUDENT** means a student under Section 1(1)(m) of the *School Act* who is:

1. 18 years of age or older; or
2. 16 years of age or older; and:
  - a) who is living independently; or,
  - b) who is a party to an agreement under Section 8(2) of the *Child Welfare Act*.

Revised

**INDIVIDUALIZED PROGRAM PLAN (IPP)** means a concise plan of action that is designed to address the student's/**child's** special needs, and is based on diagnostic information that provides the basis for intervention strategies. An IPP is mandatory for all students/**children** identified with special needs, including mild, moderate, and severe disabilities, and the gifted and talented, require an IPP.

The IPPs of students/**children** with special educational needs will include:

1. Assessment and diagnostic data that identifies strengths and areas of need;
2. Specific accommodations and support services;
3. Measurable goals and objectives;
4. Evaluation procedures;
5. Review dates;
6. Placement/Programming information; and
7. Transition plans

Revised

**IN-HOME PROGRAM** means an **Early Childhood Services (ECS) program** delivered to a **child with a disability** on a one-on-one basis through home visits in the **child's** home or other alternate setting by a teacher, teacher assistant and/or **child** development specialist. A primary purpose of an **in-home program** is to actively involve **parents** and/or caregivers (with the educational team) in the development and delivery of a comprehensive educational program for the **child**. For program and funding purposes, an eligible home visit must meet the following requirements:

- All home visits must be under the supervision of the **child's** teacher;
- A home visit must involve the **child** and the **parent/guardian** or alternate caregiver;
- A home visit must average at least 1.5 hours in length; and
- Visits to the home by a developmental specialist need to support the **child's** overall educational program in order to count as an eligible home visit.



The number, setting, and structure of home visits must be determined in consultation with the **parents** prior to implementation of the program. Some visits to alternate caregivers can be included as a part of the home program with the **parent's** agreement. Summary reports of visits to alternate caregivers must be shared with the **parent** either in written or verbal form. All home visits should be carefully planned and documented.

**IN THE CUSTODY OF A DIRECTOR** under the *Child Welfare Act* means a student who is in custody by agreement, or in temporary custody, or in permanent custody. This may also include students in Handicapped Children's Service Agreements where custody is part of the agreement.

**Revised INSTITUTION** means any secure residence prescribed by the Minister of Learning as an institution and operated or approved by the Government where staff are paid a salary to provide lodging and care on a 24 hour basis for the individuals in residence, and which is not currently provided for under the terms and conditions of foster **parent** agreements within the Province of Alberta. **Resident students of the government** attend the **school** program on site or in a facility for which the government department controlling the **institution** is legally responsible. **Resident students of the government** who reside in an **institution** have been placed there:

1. Through hospital admission; or
2. Through a court order or agreement under the *Child Welfare Act*; or
3. For protection and/or care by:
  - a) Alberta Children's Services ;
  - b) Alberta Health and Wellness; or
  - c) Alberta Justice and Attorney General; or
4. As residents of a women's shelter because of a situation where there is need for protection from physical, psychological or sexual abuse.

**Funded students** in an **institution** must be **resident students of the government** as defined in Section 44 (7) of the *School Act*.



vised

## SCHOOL AUTHORITIES APPROVED TO PROVIDE AN EDUCATIONAL PROGRAM IN AN INSTITUTION (School Code)

**Battle River RD No. 31**

Camrose Women's Shelter (4554)

**Bosco Homes A Society for Children  
and Adolescents**

Columbus Academy (0577)

Don Bosco Academy (3398)

Phoenix Academy (0028)

Thomas More Academy (0483)

**Calgary School District No. 19**

Women's Emergency Shelter

Dr. Gordon Townsend (9886)

William Roper Hull School (9033)

Westview YOC &amp; Enviros (9687)

**Chinook's Edge School Division**

Grimmon House (1058)

**Edmonton School District No. 7**

CASA House (7713)

Glenrose Hospital (7701)

Highwood (Alberta Hospital) (7701)

Howard House (7713)

Kennedale YOC (7706)

Kochee Mena (7713)

Rite Trak (McMan) (7713)

Rosecrest (7729)

Royal Alexandra Hospital (7701)

University of Alberta Hospital (7701)

WIN House (7169)

Yellowhead Youth Centre (7713)

**Elk Island PSD No. 14**

A Safe Place (3343)

**Foothills SD No. 38**

Stampede Boys Ranch (5391)

**Fort McMurray Catholic**

Youth Treatment Centre

**Grande Prairie SD No. 2357**Grande Prairie YOC (Bear Creek  
School) (1148)**Holy Family CSRD No. 37**

Francis Holistic Learning Centre (YAC) (1619)

**Lakeland RCSSD No. 150**

Dr. Margaret Savage Crisis Centre (2916)

**Lethbridge SD No. 51**

Pitawani (6456)

PCHIP/Secure Program

Harbour House (6459)

Hospital Program (6453)

Coulee Ridge YOC (6487)

**Medicine Hat SD No. 76**

Med Hat PAS Hosp (6864)

Medicine Hat Bridge St. Remand Centre (6861)

**Northern Lights SD No. 69**

Lac La Biche YAC (2716)

**Parkland School Division**

Bright Bank Academy

**Peace Wapiti School Div No. 33**

Rycroft School (1304)

Clairmont Group Home (1056)

**Red Deer School Dist No. 104**

Parkland Youth Homes (4464)

Red Deer Hospital Program (0574)

Oskayak Treatment Centre (4469)

Direwood Treatment Centre (4461)

Red Deer Remand Centre (4467)

Red Deer Youth Assessment Centre (4457)

**Sturgeon SD No. 24**

Oak Hill Boys Ranch (2509)

**St. Paul Education RD No. 1**

Poundmaker's (2807)

**Wetaskiwin Reg. Div. No. 11**

Wetaskiwin Plus (A+) Program (3143)

**Wild Rose School Division No. 66**

Kootenay School (4111)

**Wolf Creek RD No. 72**

Alberta Hospital Ponoka (4299)

Twin Oaks

**MINISTER** means the Minister of Learning.

**ON-LINE PROGRAM** is a program offered by a **school** delivered electronically at a **school** site or off-campus, under the instruction and complete supervision of a certificated teacher of a **board** or accredited **private school**. For full student funding,

elementary and junior high students must have access to 950 hours of instruction and senior high students must have access to 1000 hours of instruction.

**OPERATING DAY** is used in conjunction with rural transportation and means a day in a **school** year during which the **schools** of a **school jurisdiction** are scheduled to be open for classroom instruction.

**OTHER LANGUAGE IMMERSION PROGRAMS** means a minimum of 25 percent of the instructional time to a maximum of 50 percent of instructional time uses a language other than French or English as the language of instruction. This includes all grade levels.

**OUTREACH PROGRAM** means a program offered by a **school** which provides a basic education developed for **funded students** who are unable to attend or benefit from a regular **school** program. The requirements of the program are detailed in the Outreach Program Policy 1.1.4.

1. An **outreach program** must be offered in a stand-alone facility.
2. **Home education students** are not eligible for outreach funding, and are not reported as part of the **outreach program**.

**PARENT** means, with respect to a student, the relevant individual under section 1(2) of the *School Act* unless otherwise specified.

**PRIVATE EARLY CHILDHOOD SERVICES (ECS) OPERATOR** means a society registered under the *Societies Act*, a non-profit company registered under Part 9 of the *Companies Act*, or a non-profit corporation incorporated by, or under, an act of the Legislature, or a **funded private school**; that

Revised

1. Has been approved by Alberta Learning to operate an **ECS program**; and
2. Receives funding under the *Learning Grants Regulation* for the program.

**PRIVATE SCHOOL** means a **school** registered under Section 28 of the *School Act*.

**PUBLIC TRANSIT SYSTEM** refers to a bus or light rail system owned, operated or contracted by a city, town, village or hamlet which offers service to the public within its boundaries. Taxis and/or bussing systems designed for disabled individuals are not considered public transit.

**RECIPROCAL EXCHANGE PROGRAM** means a recognized program under which a student who is an Alberta **resident student** is partnered or paired with a student who is a resident of another province or country. The exchange occurs in the same **school jurisdiction** in the same **school** year, or the subsequent year.

**RESIDENT BOARD** means the **board** of the district or **division** of which a student is a **resident student**.

**RESIDENT STUDENT** means an individual who is entitled to have access to an education program under Section 8 and who is a **resident student** as determined under Section 44 of the *School Act*.

**RESIDENT STUDENT OF THE GOVERNMENT** means a student as defined in Section 44(7) of the *School Act* who is entitled to have access to an education program.

**ROUTE DISTANCE** is a term used in conjunction with rural transportation and means:

1. The **distance** from the point of the first morning pick-up by regular routing to the point of the last morning drop-off and back to the point of the first morning pick-up by the shortest or most direct route;
2. The **distance** from the point of the first afternoon pick-up by regular routing to the point of the last afternoon drop-off and back to the point of the first afternoon pick-up by the shortest or most direct route; and
3. The **distance** traveled on a **highway** by a vehicle transporting **eligible passengers** to and from **school**, or on a feeder route, on an **operating day** or by a vehicle transporting **eligible passengers** on a weekend between their places of residence and their boarding places or **schools** where both places are in the same district or **division**.

**RURAL DISTRICT** means a district or **division** that is not an **urban district**.

**SCHOOL** means a structured learning environment through which an education program is offered to a student by:

1. A **board**;
2. An operator of a **private school**;
3. An **Early Childhood Services (ECS) private operator**;
4. A **parent** giving a home education program; or
5. The **Minister**.

**SCHOOL AUTHORITIES** for the purpose of this manual includes **School Jurisdictions**, **Funded Private Schools**, and **Private ECS Operators**.

**SCHOOL BUILDING** means a building used for the instruction or accommodation of students that is owned or occupied by a **school jurisdiction**, a **school jurisdiction** and a municipality, or a **school jurisdiction** and another person.



**SCHOOL BUS** means a motor vehicle that:

1. Is owned, leased or contracted by a **school authority**;
2. Is used for the transportation of **eligible passengers**;
3. Has a passenger **seating capacity** of 12 or more; and
4. Is without exemption a Type I, Type II, Type III or Type IV **school bus** as described in the CSA Standard D 250-M 2001 as amended or replaced from time to time as issued by the Canadian Standards Association.

**SCHOOL JURISDICTION** means an Alberta school district, school Division, regional division, Francophone Regional Authority, **charter school**, the Lloydminster Public School Division, or the Lloydminster Roman Catholic Separate School Division.

**STUDENTS/ECS CHILDREN WITH SEVERE DISABILITIES** means **funded students** and **ECS children** who have been assessed as having a severe disability according to the definitions below:

#### CATEGORIES AND DEFINITIONS OF SEVERE DISABILITIES FOR ECS TO GR. 12

##### **SEVERE COGNITIVE DISABILITY (Code 41)**

A student/ECS **child** with a severe cognitive disability is one who:

- a) has severe delays in all or most areas of development.
- b) frequently has other disabilities including physical, sensory, medical and/or behavioural.
- c) requires constant assistance and/or supervision in all areas of functioning including daily living skills and may require assistive technology.
- d) should have a standardized assessment, which indicates functioning in the severe to profound range (standardized score of  $30 \pm 5$  or less). Functional assessments by a qualified professional will also be considered in cases where the disabilities of the student/ECS **child** preclude standard assessments; and
- e) has scores equivalent to the severe to profound levels on an adaptive behavioural scale (e.g., AAMR Adaptive Behaviour Scales-School: Second Edition (ABS-S:2); Vineland Adaptive Behaviour Scales; Scales of Independent Behaviour - Revised).

##### **SEVERE EMOTIONAL/BEHAVIOURAL DISABILITY (Code 42)**

A student/ECS **child** with a severe emotional/behavioural disorder is one who:

- a) displays chronic, extreme and pervasive behaviours which require close and constant adult supervision, high levels of structure, and other intensive support services in order to function in an educational setting. The behaviours significantly interfere with both the learning and safety of the student/ECS **child** and other students/ECS **children**. For example, the student/**child** could be dangerously



aggressive and destructive (to self and/or others), violent and/or extremely compulsive; and

- b) (for grade 1-12 students) has a diagnosis including conduct disorder, schizophrenia or bi-polar disorder, obsessive/compulsive disorders, or severe chronic clinical depression; and may display self-stimulation or self-injurious behaviour. In the most extreme and pervasive instances, severe Oppositional Defiant Disorder may qualify; or
- c) (for ECS **children**) has either a diagnosis or a statement by a qualified professional indicating that the **child** experiences severe behavioural difficulties.

A clinical diagnosis within the last 2 years of a severe emotional/behavioural disorder by a psychiatrist, chartered psychologist or a developmental pediatrician is required, in addition to extensive documentation of the nature, frequency and severity of the disorder by **school authorities**. In the case of an ECS **child** who is not currently placed in an educational environment, extensive documentation of the nature, frequency, and severity of the disorder by the referring specialist may suffice. The effects of the disability on the student's/ECS **child's** functioning in an education setting should be described. An ongoing treatment plan/behaviour plan should be available and efforts should be made to ensure that the student/ECS **child** has access to appropriate mental health and therapeutic services.

A clinical diagnosis of a severe emotional/behavioural disorder is not necessarily sufficient to qualify under this category. Some diagnoses with behavioural components that are not sufficient to qualify are: Attention-Deficit/Hyperactivity Disorder (AD/HD), Attention Deficit Disorder (ADD).

Note: Students/ECS **children** diagnosed with Fetal Alcohol Spectrum Disorder (FASD) in the most severe cases should be reported under Code 44 rather than Code 42.

### **SEVERE MULTIPLE DISABILITY (Code 43)**

A student/ECS **child** with multiple disabilities is one who:

- a) has two or more non-associated moderate to severe cognitive and/or physical disabilities which, in combination, result in the student functioning at a severe to profound level; and
- b) requires significant special programs, resources and/or therapeutic services.

Students/ECS **children** with a severe disability and another associated disability should be identified under the category of the primary severe disability. For example:

- A student/ECS **child** with a severe cognitive disability and another associated disability is not designated under this category, but is designated under severe cognitive disability.
- A student/ECS **child** with a severe emotional/behavioural disability and another associated disability is not designated under this category, but is designated under severe emotional/ behavioural disability.

The following mild or moderate disabilities cannot be used in combination with other disabilities to qualify under Code 43:

- a) Attention Deficit / Hyperactivity Disorder (AD/HD) (ECS – gr. 12)
- b) Emotional/Behavioural Disabilities (ECS – gr. 12)
- c) Learning Disability (LD) (grades 1 – 12 only)
- d) Speech and Language Related Disabilities (grades 1 – 12 only)

NOTE: ECS **children** diagnosed with Down Syndrome in the most severe cases should be reported under Severe Multiple Disability (Code 43).

### **SEVERE PHYSICAL OR MEDICAL DISABILITY** - including Autism (Code 44)

A student/ECS child with a severe physical, medical or neurological disability is one who:

- a) has a medical diagnosis of a physical disability, specific neurological disorder or medical condition which creates a significant impact on the student's/ECS **child's** ability to function in the **school** environment (note: some physical or medical disabilities have little or no impact upon the student's/ECS **child's** ability to function in the **school** environment); and
- b) requires extensive adult assistance and modifications to the learning environment in order to benefit from schooling.

A student/ECS **child** with severe autism or other severe Pervasive Developmental Disorder is included in this category. A clinical diagnosis by a psychiatrist, chartered psychologist, or medical professional specializing in the field of autism is required. A clinical diagnosis of autism is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the student/ECS **child** with autism.

In order for a diagnosis of autism to be made, the student/ECS **child** needs to demonstrate impairment in the following areas:

- Social interaction; and
- Communication; and
- Stereotyped pattern of behaviour (i.e. hand flapping, body rocking, echolalia, insistence on sameness and resistance to change).

A student/ECS **child** diagnosed with severe Fetal Alcohol Spectrum Disorder (FASD) may have Fetal Alcohol Syndrome (FAS) or Alcohol-Related Neurodevelopmental Disorder (ARND) and is included in this category (Code 44 – Severe Physical or Medical Disability – Including Autism). A clinical diagnosis by a psychiatrist, chartered psychologist with specialized training, or medical professional specializing in developmental disorders is required. A clinical diagnosis of FASD is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the student with FASD. Students/ECS **children** with severe FASD who exhibit significant impairment in the areas of social functioning, life skills, behaviour, learning, attention and concentration, will need extensive intervention and support.

**DEAFNESS (Code 45)**

A student/ECS **child** with a profound hearing loss is one who:

- a) has a hearing loss of 71 decibels (dB) or more unaided in the better ear over the normal speech range (500 and 4000 hertz (Hz)) which interferes with the use of oral language as the primary form of communication, or has a cochlear implant preceded by a 71 dB hearing loss unaided in the better ear; and
- b) requires extensive modifications and specialized educational supports; and
- c) has a diagnosis by a clinical or educational audiologist. New approvals require an audiogram within the past 3 years.

If a student/ECS **child** has a severe to profound sensori-neural hearing loss that has not changed significantly since the initial approval by Alberta Learning, documentation from a qualified specialist in the field of deafness outlining the severity of the hearing loss and modifications to the learning environment may be sufficient to support eligibility.

**BLINDNESS (Code 46)**

A student/ECS **child** with severe vision impairment is one who:

- a) has corrected vision so limited that it is inadequate for most or all instructional situations, and information must be presented through other means; and
- b) has a visual acuity ranging from 6/60 (20/200) in the better eye after correction, to having no usable vision or field of vision reduced to an angle of 20 degrees.

If a student/ECS **child** has a severe to profound visual impairment that has not changed significantly since the initial approval by Alberta Learning, documentation from a qualified specialist in the field of vision outlining the severity of the disability and modifications to the learning environment may be sufficient to support eligibility.

For those students/ECS **children** who may be difficult to assess (e.g. cortical blindness – developmentally delayed), a functional visual assessment by a qualified specialist in the field of vision or a medical professional may be sufficient to support eligibility.

Revised

**SEVERE COMMUNICATION DISORDER (Code 47) - For ECS children only.**

A **child** with a severe communication disorder has severe difficulty in communicating with peers and/or adults because of a severe disorder in expressive and/or receptive language and/or total language. This typically includes little, if any, expressive or receptive communication skills.

**Children** who experience a severe communication disorder, as defined here, and have sufficient communicative ability to permit formal speech/language assessment should demonstrate results less than or equal to the first percentile in expressive and/or receptive language and/or total language. Parental report and/or observational measures in conjunction with a description of the child's communication



ability may be used if formal language assessment is not possible. These results should indicate that the child has very limited communication skills, or has an age equivalent on receptive and/or expressive language equal to or less than one half the child's chronological age. Results that are at or below the first percentile, on individual components of language (i.e. sentence structure, word structure, sentence recall, etc.) do not meet Alberta Learning criteria for a severe communication disorder.

**Children** whose primary language disorder is in the area of phonology are considered to meet criteria for Severe Communication disorder under the following conditions:

- A current speech/language assessment identifies the severity of the **child's** phonological delay as falling in the severe to profound range.
- The phonological delay is accompanied by delays in the **child's** receptive and/or expressive language.
- The phonological delay significantly impacts the **child's** intelligibility.
- The impact of the **child's** total language difficulties is such that extensive supports and services are required in order for the **child** to function within an ECS setting.
- A phonological delay significantly impacts the **child's** acquisition of early literacy, language concepts and/or social use of language and therefore must be addressed through the educational component of the **child's** program (IPP).

A speech-language assessment report completed within six months prior to the day the **child** begins his/her program must be submitted with the PUF application.

To facilitate communication skills, these **children** may benefit from small group work or clustering with peers of the same age, and a 475 hour program may be sufficient.

If a **child** has a moderate to severe disability in a non-associated category (in addition to having a moderate to severe communication disorder), then the **child** would be more appropriately identified as Severe Multiple Disability (Code 43). This only applies for eligible ECS **children** and does not apply for students in grades 1 to 12.

**New** **STUDENT WITH A DISABILITY** means a **funded student** who has been assessed and coded as having a mild, moderate or severe disability.

**Revised** **STUDENT WITH SPECIAL NEEDS** means a student who requires an adapted or modified educational program to meet his or her exceptional needs. The **Individualized Program Plan (IPP)** provides documentation of the program and is a mandatory requirement for any student identified as a special needs student. This includes students with a mild, moderate or severe disability and students who are gifted and talented.

**SUPERVISING BOARD** means the **resident board** or the willing non-resident board providing supervision of the home education program.

**TEMPORARY RESIDENT**, for purposes related to the interpretation of the *School Act*, is defined as a person who:



- a) has been issued a study permit and is registered in a full-time, full-year program (i.e., a foreign student who is registered full-time in a recognized post-secondary program in Alberta for one year or more); or
- b) has been issued an employment authorization to work temporarily in Canada (i.e., a temporary foreign worker); or
- c) has filed a refugee claim to the Immigration and Refugee Board (IRB) within the past year (i.e., a refugee claimant); or
- d) has been issued a federal Minister's Permit; or
- e) has diplomatic status in Canada.

**Temporary residents** will not include:

- a) visitors/tourists to Canada, with or without a valid visitor's visa;
- b) individuals in Canada with student authorizations who are not registered in a full-time, full-year program; and
- c) individuals in Canada for three months or less for the purposes of language training.

A **child** whose **parent(s)** fit the definition of a **temporary resident**, as it relates to the *School Act*, is eligible to access basic education and the **parent** can not be required to pay foreign student tuition fees. In all other cases the **parent** may be required to pay foreign student fees at the discretion of the school **board**. Students of **school** age who are in Canada on a study permit are considered Foreign Students and do not qualify for Alberta Learning funding.

See also definition of **Funded Student** (glossary) and Section 8 of the *School Act*.

**TRANSPORTATION AGREEMENT** means an agreement or a portion of an agreement entered into by a **school jurisdiction** under Section 62 of the *School Act* to transport students under its authority to a **school**.

**UNORGANIZED TERRITORY** means any area in Alberta that is not included within a district, a **division**, or a regional **division**.

**URBAN DISTRICT** means:

- 1. A city district which is not included in a **school division** or regional **division**; and
- 2. A district, **division** or regional **division**, or portion thereof, designated by the **Minister** as an **urban district**.

**WEIGHTING FACTOR** is a term used in conjunction with rural transportation and means, for the purposes of Block Funding, that:

- 1. Each **eligible passenger** in ECS and grades 1 to 6 is multiplied by a factor of 1.0;
- 2. Each **eligible passenger** in grades 7 to 12, is multiplied by a factor of 1.50;

3. Each **eligible passenger** in grades 1 to 12 registered as a Code 41, 42, 43, 44 or 46 student, is multiplied by a factor of 3.0;
4. An aide accompanying a **student/child with a severe disability** is multiplied by a factor of 1.50; and
5. Each **eligible passenger** who requires a wheelchair is multiplied by 6.0.

Revised

# **Forms**

- **2003/2004  
Program Unit Funding  
Application (03AL2.5a)**
- **ECS PUF Statement of Actual  
Expenditures for School  
Jurisdictions (03AL2.5b)**
- **Application – ECS Transportation  
(03AL2.6)**

## 2003/2004 PROGRAM UNIT FUNDING APPLICATION EARLY CHILDHOOD SERVICES

Refer to Part 1, Section 1.7 (School Jurisdictions) and Part 2, Section 2.5 (Private ECS Operators) of the Funding Manual For School Authorities for information on the completion of this application.

Submit one copy of this application for each school/centre to School Finance.

Name of School Jurisdiction/Private School/Society: \_\_\_\_\_

Name of School/Centre: \_\_\_\_\_

Address: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Telephone No: \_\_\_\_\_

Fax No: \_\_\_\_\_ E-Mail Address: \_\_\_\_\_

Number of Program Unit children:  
(claimed on this application)

Budget Amount:  
(for this application)

\$

Have any of these Program Unit children been with a previous operator?

☐

YES

☐

NO

Has Basic Instruction funding been claimed for these children?

☐

YES

☐

NO

- NOTE:**
- ☐ The Budget amount is subject to change upon review by the Alberta Learning staff.
  - ☐ Final payments will be based on the lesser of the approved budget amount, funding ceiling or actual expenditures.

### DECLARATION

The undersigned does hereby declare that an individualized program has been developed and will be carried out for each child on this application and that:

- The parent(s) / guardian(s) of each child in this program unit is/are fully aware that special program plans are in place and that this application is being submitted on the child's behalf.
- Each child has been identified through screening and assessment carried out by community health nurses, parent(s) / guardian(s), teachers and/or child development specialists in accordance with criteria outlined in or Part 1, Section 1.7 or Part 2, Section 2.5 of the Funding Manual For School Authorities.
- Program goals for each child have been developed on the basis of recommendations arising from screening and assessment data.
- A program consistent with the special needs of each child will be undertaken by the teacher(s), assisted by appropriate support staff in the most enabling educational environment.
- Consultative assistance will be provided to staff and parent(s) / guardian(s) as required.
- Direct services will be provided to each child and/or parent(s) / guardian(s) as required.
- Case conferences will be held regularly to evaluate each child's progress and to decide on changes, where appropriate, in the program in consultation with the parent(s) / guardian(s).
- long term plans for the child(ren) have been discussed with the receiving school authority(ies)

I certify that the programs identified in this report are being offered in accordance with Alberta Learning program requirements and that, to the best of my information and knowledge, the information provided on this application is correct.

\_\_\_\_\_  
(Signature of Secretary-Treasurer)

\_\_\_\_\_  
(Date)

### FOR DEPARTMENT USE:

APPROVED BY: \_\_\_\_\_

(Signature of Performance Certifier)  
Special Programs Branch

Amount Approved: \$ \_\_\_\_\_

\_\_\_\_\_  
(Signature of Expenditure Officer)  
School Finance Branch

Date Approved: \_\_\_\_\_



## CRITERIA FOR DETERMINING ELIGIBILITY FOR PROGRAM UNIT FUNDING

### Descriptions of Severe Disabling Conditions

#### Severe Cognitive Disability (Code 41)

A child with a severe cognitive disability is one who:

- a) has severe delays in all or most areas of development
- b) frequently has other disabilities including physical, sensory, medical and/or behavioural
- c) requires constant assistance and/or supervision in all areas of functioning including daily living skills and may require assistive technology
- d) should have a standardized assessment which indicates functioning in the severe to profound range (standardized score of  $30 \pm 5$  or less). Functional assessments by a qualified professional will also be considered in cases where the disabilities of the child preclude standard assessments; and
- e) has scores equivalent to the severe to profound levels on an adaptive behavioural scale (e.g., AAMR Adaptive Behaviour Scales-School: Second Edition (ABS-S:2), Vineland Adaptive Behaviour Scales, Scales of Independent Behaviour - Revised)

#### Severe Emotional/Behavioural Disability (Code 42)

A child with a severe emotional/behavioural disorder is one who:

- a) displays chronic, extreme and pervasive behaviours which require close and constant adult supervision, high levels of structure, and other intensive support services in order to function in an educational setting. The behaviours significantly interfere with both the learning and safety of the child and other children. For example, the child could be dangerously aggressive and destructive (to self and/or others), violent and/or dangerously compulsive; and
- b) has either a diagnosis or a statement by a qualified professional indicating that the child experiences severe behavioural difficulties.

A clinical diagnosis within the last 2 years of a severe emotional/behavioural disorder by a psychiatrist, chartered psychologist or a developmental pediatrician is required, in addition to extensive documentation on the nature, frequency and severity of the disorder by **school authorities**. In the case of an ECS child who is not currently placed in an educational environment, extensive documentation of the nature, frequency, and severity of the disorder by the referring specialist may suffice. The effects of the disability on the child's functioning in an education setting should be described. An ongoing treatment plan/behaviour plan should be available and efforts should be made to ensure that the child has access to appropriate mental health and therapeutic services.

A clinical diagnosis of a severe emotional/behaviour disorder is not necessarily sufficient to qualify under this category. Some diagnoses with behavioural components that are not sufficient to qualify are: Attention-Deficit/Hyperactivity Disorder (AD/HD), Attention Deficit Disorder (ADD).

Note: ECS children diagnosed with Fetal Alcohol Spectrum Disorder (FASD) in the most severe cases should be reported under Code 44 rather than Code 42.

#### Severe Multiple Disability (Code 43)

A child with multiple disabilities is one who:

- a) has two or more non-associated moderate to severe cognitive and/or physical disabilities which, in combination, result in the child functioning at a severe to profound level; and
- b) requires significant special programs, resources and/or therapeutic services.

Children with a severe disability and another associated disability should be identified under the category of the primary severe disability. For example:

- A child with a severe cognitive disability and another associated disability is not designated under this category, but is designated under severe cognitive disability.
- A child with a severe emotional/behavioural disability and another associated disability is not designated under this category, but is designated under severe emotional/behavioural disability.

The following mild/moderate disabilities cannot be used in combination with other disabilities to qualify under code 43:

- a) Attention Deficit / Hyperactivity Disorder (AD/HD)
- b) Emotional/Behavioural Disabilities

Note: ECS children diagnosed with Down Syndrome in the most severe cases, should be reported under Severe Multiple Disability (Code 43)

#### Severe Physical or Medical Disability - including Autism (Code 44)

A child with a severe physical, medical or neurological disability is one who:

- a) has a medical diagnosis of a physical disability, a specific neurological disorder or medical condition which creates a significant impact on the child's ability to function in the school environment (note: some physical or medical disabilities have little or no impact upon the child's ability to function in the school environment); and
- b) requires extensive adult assistance and modifications to the learning environment in order to benefit from schooling.

A child with severe autism or other severe pervasive developmental disorder is included in this category. A clinical diagnosis by a psychiatrist, chartered psychologist, or medical professional specializing in the field of autism is required. A clinical diagnosis of autism is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the child with autism.

In order for a diagnosis of autism to be made, the child needs to demonstrate impairment in the following areas:

- social interaction
- communication; and
- stereotyped pattern of behaviour (i.e. hand flapping, body rocking, echolalia, insistence on sameness and resistance to change).

A child diagnosed with severe Fetal Alcohol Spectrum Disorder (FASD) may have Fetal Alcohol Syndrome (FAS) or Alcohol-Related Neurodevelopmental Disorder (ARND) and is included in this category (Code 44 – Severe Physical or Medical Disability – Including Autism). A clinical diagnosis by a psychiatrist, chartered psychologist with specialized training, or medical professional specializing in developmental disorders is required. A clinical diagnosis of FASD is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the child with FASD. Children with severe FASD who exhibit significant impairment in the areas of social functioning, life skills, behaviour, learning, attention and concentration, will need extensive intervention and support.

#### **Deafness (Code 45)**

A child with a profound hearing loss is one who:

- a) has a hearing loss of 71 decibels (dB) or more unaided in the better ear over the normal speech range (500 and 4000 hertz (Hz)) which interferes with the use of oral language as the primary form of communication or has a cochlear implant preceded by a 71 dB hearing loss unaided in the better ear; and
- b) requires extensive modifications and specialized educational supports; and
- c) has a diagnosis by a clinical or educational audiologist. New approvals require an audiogram within the past 3 years.

If a child has a severe to profound sensori-neural hearing loss that has not changed significantly since the initial approval by Alberta Learning, documentation from a qualified specialist in the field of deafness outlining the severity of the hearing loss and modifications to the learning environment may be sufficient to support eligibility.

#### **Blindness (Code 46)**

A child with severe vision impairment is one who:

- a) has corrected vision so limited that it is inadequate for most or all instructional situations, and information must be presented through other means; and
- b) has a visual acuity ranging from 6/60 (20/200) in the better eye after correction, to having no usable vision or field of vision reduced to an angle of 20 degrees.

If a child has a severe to profound visual impairment that has not changed significantly since the initial approval by Alberta Learning, documentation from a qualified specialist in the field of vision outlining the severity of the disability and modifications to the learning environment may be sufficient to support eligibility.

For those children who may be difficult to assess (e.g. cortical blindness – developmentally delayed), a functional visual assessment by a specialist in the field of vision or a medical professional may be sufficient to support eligibility.

#### **Severe Communication Disorder (Code 47) - For ECS children only.**

A **child** with a severe communication disorder has severe difficulty in communicating with peers and/or adults because of a severe disorder in expressive and/or receptive language and/or total language. This typically includes little, if any, expressive or receptive communication skills.

**Children** who experience a severe communication disorder, as defined here, and have sufficient communicative ability to permit formal speech/language assessment should demonstrate results less than or equal to the first percentile in expressive and/or receptive language and/or total language. Parental report and/or observational measures in conjunction with a description of the **child's** communication ability may be used if formal language assessment is not possible. These results should indicate that the **child** has very limited communication skills, or has an age equivalent on receptive and/or expressive language equal to or less than one half the **child's** chronological age. Results that are at or below the first percentile, on individual components of language (i.e. sentence structure, word structure, sentence recall, etc.) do not meet Alberta Learning criteria for a severe communication disorder.

**Children** whose primary language disorder is in the area of phonology are considered to meet criteria for Severe Communication disorder under the following conditions:

- A current speech/language assessment identifies the severity of the **child's** phonological delay as falling in the severe to profound range.
- The phonological delay is accompanied by delays in the **child's** receptive and/or expressive language.
- The phonological delay significantly impacts the **child's** intelligibility.
- The impact of the **child's** total language difficulties is such that extensive supports and services are required in order for the **child** to function within an ECS setting.
- A phonological delay significantly impacts the **child's** acquisition of early literacy, language concepts and/or social use of language and therefore must be addressed through the educational component of the **child's** program (IPP).

A speech-language assessment report completed within six months prior to the day the child begins his/her program must be submitted with the PUF application.

To facilitate communication skills, these children may benefit from small group work or clustering with peers of the same age, and a 475-hour program may be sufficient.

If a child has a moderate to severe disability in a non-associated category (in addition to having a moderate to severe communication disorder), then the child would be more appropriately identified as Severe Multiple Disability (Code 43). This only applies for eligible ECS children and does not apply for students in grades 1 to 12.



DETAILS OF CHILDREN IN PROGRAM UNIT(S)

Alberta Learning ID #	Name of Child Surname/Given Name(s)	Age Dept Use Only	Date of Birth			Location(s) of Child's Program	R or N*	**Assessed Primary Disability Code	Date Program Starts			Date Program Ends			Number of Centre Program Hours	In-Home Programs***	
			Yr.	Mo.	Day				Yr.	Mo.	Day	Yr.	Mo.	Day		Total # of Visits	Total # of Visit Hours
	FIRST PROGRAM UNIT																
1.																	
2.																	
3.																	
4.																	
5.																	
6.																	
	SECOND PROGRAM UNIT																
1.																	
2.																	
3.																	
4.																	
5.																	
6.																	
	THIRD PROGRAM UNIT																
1.																	
2.																	
3.																	
4.																	
5.																	
6.																	
	FOURTH PROGRAM UNIT																
1.																	
2.																	
3.																	
4.																	
5.																	
6.																	

\* In this column please indicate whether it is:  
 (R) - for a renewal application;  
 (N) - for a new application.

\*\* Refer to assessed primary disability by Code, i.e., Code 41 Severe Mental Disability, Code 42 Severe Emotional/Behavioral Disability, Code 43 Severe Multiple Disability, Code 44 Severe Physical or Medical (Including autism) Disability, Code 45 Deafness, Code 46 Blindness and Code 47 Severe Communication Disability.

For code 44, if the child has autism or other pervasive developmental disorders, also write in specific disability in the space provided.

\*\*\* Please show the total number of eligible home visits for the school year and the total number of hours these visits comprise.

# PROGRAM UNIT FUNDING (PUF) BUDGET

PLEASE SUBMIT A SEPARATE BUDGET FOR EACH UNIT

NAME(S) \_\_\_\_\_

## INSTRUCTIONAL COSTS

### PROGRAM UNIT COSTS

Salaries and Wages (# of hours \_\_\_\_\_ X \_\_\_\_\_ rate per hour) \$ \_\_\_\_\_  
 (# of hours should not exceed the child's program hours by more than 10%)

Employer's Portion of Fringe Benefits \$ \_\_\_\_\_

Services Purchased (Please specify service with # of hours and rate per hour) \$ \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Supplies and Materials (Please attach a list if > \$500 per child) \$ \_\_\_\_\_

PARENT INSERVICE – please specify \_\_\_\_\_ \$ \_\_\_\_\_

STAFF INSERVICE – please specify \_\_\_\_\_ \$ \_\_\_\_\_

## TRANSPORTATION COSTS:

- Transportation: to and from school # trips \_\_\_\_\_ X \$ \_\_\_\_\_
- In-Home Programs # visits \_\_\_\_\_ X \$ \_\_\_\_\_
- Other: - Field Trips \_\_\_\_\_
- In-Program Transportation \_\_\_\_\_

Total Transportation Costs                      (A)

## LESS: TRANSPORTATION REVENUES

Alberta Learning Special Needs Transportation Funding: (See Funding Manual, Part 2, Section 2.6 and 2.7 for Private ECS Operators and Part 1, Sections 1.17 - 1.20 for School Jurisdictions.)

- Special Transportation # trips \_\_\_\_\_ X \$11.74 \_\_\_\_\_
- Regular Transportation # children \_\_\_\_\_ X \$436/yr \_\_\_\_\_
- In-Home Transportation # visits \_\_\_\_\_ X \$11.74 \_\_\_\_\_
- Other Transportation Revenues (i.e., fees) \_\_\_\_\_

Total Transportation Revenues                      (B)

NET TRANSPORTATION COSTS: (Costs (A) less Revenues (B), if difference is negative enter 0) \$ \_\_\_\_\_

## CAPITAL COSTS (child specific only)

Furniture and Equipment: Please specify: \_\_\_\_\_ \$ \_\_\_\_\_

Note: Please attach, to this application, a letter of recommendation from an appropriate specialist supporting the capital purchase.

**TOTAL PROGRAM UNIT COSTS**

\$ \_\_\_\_\_

Guidelines for the above expenditure areas are found in the Funding Manual, Part 1, Section 1.7 or Part 2, Section 2.5

DEPT. USE ONLY CEILING AMOUNT (based on program hours and # of home visits) \_\_\_\_\_



**TOTAL ECS PROGRAM BUDGET FOR  
DESIGNATED SPECIAL EDUCATION ECS PROGRAMS APPLYING FOR PROGRAM UNIT FUNDING (PUF)**

**INSTRUCTIONAL COSTS**

**ECS PROGRAM COSTS**

Salaries and Wages (Please attach breakdown of # of teachers, aides, etc. and costs) \$ \_\_\_\_\_

Employer's Portion of Fringe Benefits \$ \_\_\_\_\_

Services Purchased (Please attach breakdown of type of service and cost) \$ \_\_\_\_\_

Supplies and Materials (Please attach a list if > \$500 per child) \$ \_\_\_\_\_

**PARENT INSERVICE**

\$ \_\_\_\_\_

**STAFF INSERVICE**

\$ \_\_\_\_\_

**TRANSPORTATION COSTS:**

• Transportation: to and from school # trips \_\_\_\_\_ X \$ \_\_\_\_\_

• In-Home Programs # visits \_\_\_\_\_ X \$ \_\_\_\_\_

• Other: - Field Trips \_\_\_\_\_

• In-Program Transportation \_\_\_\_\_

**Total Transportation Costs** \_\_\_\_\_ (A)

**LESS: TRANSPORTATION REVENUES**

Alberta Learning Special Needs Transportation Funding: (See Funding Manual, Part 2, Sections 2.6 and 2.7 for Private ECS Operators and Part 1, Sections 1.17 - 1.20 for School Jurisdictions)

• Special Transportation # trips \_\_\_\_\_ X \$11.74 \_\_\_\_\_

• Regular Transportation # children \_\_\_\_\_ X \$436/yr. \_\_\_\_\_

• In-Home Transportation # visits \_\_\_\_\_ X \$11.74 \_\_\_\_\_

• Other Transportation Revenues \_\_\_\_\_

**Total Transportation Revenues** \_\_\_\_\_ (B)

**NET TRANSPORTATION COSTS:** (Costs (A) less Revenue (B), if difference is negative, enter \$0) = \$ \_\_\_\_\_

**FACILITY COSTS:** (Please attach a list of costs) \$ \_\_\_\_\_

**ADMINISTRATION:** Please attach a breakdown of costs \$ \_\_\_\_\_

**CAPITAL COSTS:**

Furniture and Equipment: (Please attach a list of costs) \$ \_\_\_\_\_

**TOTAL ECS PROGRAM COSTS**

\$ \_\_\_\_\_

**LESS: APPLICABLE REVENUES**

Alberta Learning Basic Instruction \$ \_\_\_\_\_

Mild or Moderate \$ \_\_\_\_\_

Plant Operation and Maintenance \$ \_\_\_\_\_

Alberta Learning Other (please attach a list) \$ \_\_\_\_\_

ECS Administration -(Applies only

to private ECS operators) \$ \_\_\_\_\_

Other Revenues (please specify) \$ \_\_\_\_\_

**TOTAL REVENUES**

\$( \_\_\_\_\_ )

**NET ECS PROGRAM COSTS ELIGIBLE FOR PROGRAM UNIT FUNDING  
(total costs minus total revenues)**

\$ \_\_\_\_\_

Guidelines for the above expenditure areas are found in the Funding Manual, Part 1, Section 1.7 or Part 2, Section 2.5

**DEPT. USE ONLY: CEILING AMOUNT** (based on children's program hours and number of home visits) \$ \_\_\_\_\_

**ECS PROGRAM UNIT FUNDING  
STATEMENT OF ACTUAL  
EXPENDITURES  
FOR SCHOOL JURISDICTIONS**

NAME OF SCHOOL JURISDICTION: \_\_\_\_\_

- Complete only one statement of actual expenditures for all Program Unit Funded (PUF) children (except designated special education ECS programs).
- School jurisdictions with approved Designated Special Education ECS programs should complete a separate form for each designated program.
- Final payment of Program Unit Funding will be based on the lesser of actual expenditures, approved budget amount, and ceiling amount.
- Guidelines for expenditures are found in the *Funding Manual for School Authorities*, Part 1, Section 1.7.

Contact Name: \_\_\_\_\_ Telephone No. \_\_\_\_\_

**CERTIFICATION**

**FUNDING CALCULATION:**

- |   |          |
|---|----------|
| i) Actual Expenditures (from p. 2)      | \$ _____ |
| ii) Approved Budgets Total (dept. only) | \$ _____ |
| iii) Funding Ceiling Total (dept. only) | \$ _____ |

I certify that the information reported on this form is correct and that the above costs have not been claimed under any other program.

\_\_\_\_\_  
(Signature of Secretary-Treasurer)

\_\_\_\_\_  
(Date)

**FOR DEPARTMENT USE ONLY:**

Allocation Approved \$ \_\_\_\_\_

APPROVED BY: \_\_\_\_\_  
(Signature of Expenditure Officer)

\_\_\_\_\_  
(Date)

**ECS PROGRAM UNIT FUNDING  
STATEMENT OF ACTUAL EXPENDITURES  
2003/2004 SCHOOL YEAR  
FOR SCHOOL JURISDICTIONS**

**NAME OF SCHOOL JURISDICTION:** \_\_\_\_\_

**ACTUAL  
EXPENDITURES**

**INSTRUCTION**

Salaries and Wages	_____
Employer's Portion of Fringe Benefits	_____
Services Purchased	_____
Supplies and Materials	_____

**PARENT INSERVICE/STAFF INSERVICE**

\_\_\_\_\_

**TRANSPORTATION COSTS:**

	<u>Actual Cost</u> (A)	<u>Revenue</u> (B)
To and From School	_____	_____
In-Home Visits	_____	_____
Other	_____	_____
<b>TOTALS</b>	=====	=====

**NET Transportation Costs: (A) - (B) (if difference is negative, enter 0)**

\_\_\_\_\_

**ADMINISTRATION COSTS (for Designated Sp. Ed. ECS Operators only)**

\_\_\_\_\_

**CAPITAL: FURNITURE AND EQUIPMENT -**

(ONLY capital equipment approved on a budget should be claimed.

Please attach a list of capital items purchased indicating the child's name beside each.

\_\_\_\_\_

**TOTAL ECS PUF EXPENDITURES**

\$ \_\_\_\_\_

**FOR DESIGNATED SPECIAL EDUCATION ECS PROGRAMS ONLY**

Please indicate the number of ECS children enrolled on Sept. 30 for this program \_\_\_\_\_.

Basic Instruction and any other applicable revenues for these children will be applied to the total program costs and the net costs will be eligible for program unit funding.

**APPLICATION FORM  
EARLY CHILDHOOD SERVICES  
TRANSPORTATION  
2003/2004 School Year**

**TRANSPORTATION AS OF SEPTEMBER 30**

\_\_\_\_\_  
**Name of Private ECS Operator or Metro Urban School Jurisdiction**

**INSTRUCTIONS:**

Complete this form using:

- (a) the number of children with disabilities being transported.
- (b) the number of days transported.
- (c) the number of regular children being transported.
- (d) the number of planned in-home visits.

**DATE PROGRAM BEGINS:** \_\_\_\_\_ **DATE PROGRAM ENDS:** \_\_\_\_\_

**1 Regular Transportation (private ECS operators only)**

Number of eligible transported ECS  
children transported by a school bus,  
public transit system, or parent.

\_\_\_\_\_ X \$436 = \$ \_\_\_\_\_

**2 Special Transportation**

Total number of days transported for  
all ECS children with disabilities  
requiring special transportation.

\_\_\_\_\_ X \$11.74 = \_\_\_\_\_

Number of special needs children  
requiring special transportation.

\_\_\_\_\_

**3 In-Home Visits**

Total number of in-home visits for all  
ECS children with special needs.

\_\_\_\_\_ X \$11.74 = \$ \_\_\_\_\_

Number of special needs children home visits are provided for.

\_\_\_\_\_

**CERTIFICATION**

I certify that to the best of my information and knowledge, the number of children transported, the number of in-home visits, and the number of days transported, are accurate.

\_\_\_\_\_  
(Signature of Secretary-Treasurer)

\_\_\_\_\_  
(Date)





